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ABSTRACT

This proceedings of a conference held in May 2000 at Malaspina University-College (British Columbia) contains approximately 63 conference papers, abstracts of papers, and keynote speeches. The conference examined issues affecting rural communities, with major themes being rural education, health, human services, families, and the sustainability of rural communities. The conference aimed to foster an international network of rural scholars, which had its beginnings at a 1994 conference of the same name, held at James Cook University in Queensland, Australia. Topics of speeches and papers include history of U.S. rural women teachers, rural school reform, public policies affecting rural communities, adjustment of professionals relocating to rural areas, community health services and initiatives, rural community information services, rural studies programs, Aboriginal education in Canada and Australia, information technology use on farms and in rural schools and communities, rural health issues, community viability, rural economy, community development issues and programs, connections between rural schools and communities, and distance education. Profiles of keynote speakers and contact information for conference participants are included. (SV)

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Malaspina University-College

Issues Affecting Rural Communities (II)

Proceedings of the
Rural Communities & Identities in the Global Millennium
international conference

Malaspina University-College
May 1-5, 2000

Edited by J.C Montgomery and A.D. Kitchenham

Rural Communities Research &
Development Centre

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FOREWORD

James Cook University's international conference on Issues Affecting Rural Communities held in Townsville, Queensland, established a goal of providing a thematic framework to begin to coalesce discipline-based presentations on rural issues. These issues were related to education, health, culture, policy, science and technology, social and environmental justice, communications and information equity, women's concerns, First Nations concerns, community sustainability, and distance learning as they pertained to rural communities. Malaspina University-College's 2000 conference in Nanaimo, British Columbia, Canada was a continuation of that 1994 conference. From the beginning, the Malaspina team set a focus on the rural child, which necessitated looking at issues from education, health, and human services; as well as from organizations supporting families and others dealings with the sustainability of rural communities. As the timing of the conference coincided with the turning of the century, the planning committee chose to work with the theme of a rural community's identity; of its place in the world. As rural issues can never be seen in isolation, the committee further decided to stay with its predecessor's international and national perspective, always looking for implications at a local level.

Structurally, the conference was constructed to look back over the last century, to look around at the present one, and to look ahead to the future. Very much on purpose, the conference was scheduled with longer-than-normal breaks between sessions, as also from the beginning we harbored a second goal, the fostering of the rural network that flourished after the Townsville gathering. The committee strove throughout the conference to provide time and opportunities for delegates to meet and share their thoughts with each other. From an authentic west coast First Nations welcome-to-the-land ceremony, to the day of sightseeing and touring, to the final banquet, this goal was achieved. Delegates were overwhelmingly supportive of the establishment of an international association to maintain the network and to work towards a future conference looking at issues affecting rural communities. A legacy of the Townsville conference was the strengthening of interdisciplinary collaboration on rural issues. A legacy of the Nanaimo conference must include a fostering of this look "between the cracks" which led to the formation of the International Association for Comparative Research Into Rural Community Sustainability. IACRRCS's first task is to support the University of Aberdeen's Arkleton Centre for Rural Development Research continuation of this theme in its June, 2003 conference in Aberdeen, Scotland.

Since enhancing international linkages were seen as such an important goal to the Nanaimo conference, the planning committee enlisted the aid of an advisory panel, representing prominent rural scholars from Norway, Scotland, New Zealand, Australia, Canada, and the United States. This team conceptualized and created the objectives of the conference, and in no small way were responsible for the outpouring of support from the planning committee received from speakers, presenters, and delegates. Conference organizers remain indebted to:

- Professor Tom Tiller (UNIKOM, University of Tromso, Norway),
- Professor John Bryden (Arkleton Centre for Rural Development Research, University of Aberdeen, Scotland),
- Professor Emelia Martinez-Brawley (Dean of Social Work, Arizona State University),
- Professor Ken Stevens (Centre for Telelearning and Rural Education, Memorial University of Newfoundland, Canada)
- Dr. Jack Shelton (Program for Rural Services and Research. University of Alabama),
- Dr. Andrew Higgins, (Flexible Learning Unit, University of Otago, New Zealand),
- Mr. Paul Nachtigal (Annenberg Rural Challenge Centre, Colorado),
- Dr. Toni Haas (Annenberg Rural Challenge Centre, Colorado),
- Mark Whitham (Australia Rural Education Research Association),
- Mrs. Gail Mosely (Rural Teachers Association of B.C., Canada),
- Mrs. Nancy LaFramboise (Director of Red Cross Outpost Nursing, B.C., Canada), and
- Dr David McSwan, Rural Education Research and Development Centre, James Cook University, Queensland, Australia

This panel created a set of specific objectives that included creating an international association of rural scholars, the further fostering of an international faculty of rural researchers, committing to future information sharing, contributing to the literature on rural communities, fostering joint research projects, stimulating teaching and research (and funding) in tertiary institutions, furthering the working relationships between scholars, professionals, and practitioners, identifying priority research and development issues, establishing genuine cross-disciplinary understandings and cooperation, and looking back at the last century in order to look ahead to the next. These proceedings reflect the inroads we feel we have made towards each of these objectives.

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On behalf of you, the readers of these proceedings, I would like to here thank the members of the conference organizing team that gave so generously of their spare time, their humour, their skills, their thoughts, and themselves.

Dr. Jim Montgomery
Conference Chair

Conference Committee (Malaspina University-College)

Mrs. Marilyn Chapman
Mrs. Colleen Doylend
Dr. Mike Grant
Mrs. Darlene Higgins
Miss Jenny Horn
Dr. Andrew Kitchenham
Dr. David McSwan (James Cook University)
Mrs. Lorna Millard
Dr. John Neville
Mrs. Mary O'Neill,
Dr. Katherine Pepper-Smith

Editors' Note:

The editors wish readers to know that any graphics, tables, figures, or maps referenced within a paper are contained at the conclusion of that paper. In addition, any omissions of references are noted within the paper as an "Editor's note"; we apologize for this interruption in the reader's flow of text. Lastly, we both thank Darlene Higgins for the countless hours she put into finishing the formatting of the text after the editors had worked through the content.

Dr. Andrew Kitchenham – Proceedings Chair

OPENING ADDRESS

Introduction to the Rural Network

David McSwan, Australia

To be with you at Nanaimo in British Columbia is a privilege and a pleasure. As convenor of the 1994 Conference "Issues Affecting Rural Communities" held in Townsville, I have a feeling of deep satisfaction knowing that the motivations for that conference are durable and shared among the international community of scholars and professionals who have as their work and passion, the well being of rural residents and communities.

The 1994 conference aimed to bring together rural education, health and community and economic development folk with the view of assisting in the generation of a new era of study, and of creating new models for collaborative work on human issues in rural communities. There was (and still is) sparse collaboration across disciplines, cultures, and international boundaries. I am pleased to note that six years later some successful projects have been undertaken; not many, but some.

Perhaps the most gratifying legacy of the 1994 conference has been the continuing interaction among delegates; the sharing of news and views; the consultations conversations and "sounding board" exchanges. The passage of time has seen an increase in the general awareness of rural places, rural people, rural pursuits and rural lifestyles. In my own country there is currently a national inquiry by the Human Rights and Equal Opportunities Commission into Education in rural and remote areas. As well, in 1999 the Deputy Prime Minister organised a National Regional Summit. Images of "rural" (mostly negative) have seldom been so much in the public eye in Australia. A cynic might point to a disastrous election in the state of Victoria where the Premier publicly marginalised rural people, rural values and rural people; and paid the price at the ballot box. Also, the emergence of an ultra right wing political party during the last national election shook the Federal government to its core.

Rural industries, rural communities and rural people are receiving attention as never before. One really encouraging and healthy concern to come to the public eye is the recognition that Australia does not have a genuine rural community policy. Sher and Sher, in a background paper for the "Issues Affecting Rural Communities" conference (McSwan & McShane 1994), touched a raw nerve by demonstrating that the conventional wisdom and policy of successive state and national governments effectively marginalised rural communities and residents; the dictum that "what is good for rural industries is good for rural Australia" was shown to be a fallacy.

With this as background you can understand my feelings of gratitude to Dr. Montgomery and his conference committee for taking up the challenge of pursuing the ideals of the 1994 conference. One has only to read the list of keynote speakers on the program to be impressed with the sense of continuity that this conference provides.

This conference "Rural Communities and Identities in the Global Millennium" sharpens the focus on the rural child which enables looking at issues from the perspectives of education, health, and human services. I note that the planning provides for a thematic framework aimed at supporting interdisciplinary presentations on rural issues. More specifically the objectives of this conference are:

- contributing to the evolution of an international association of rural scholars, professionals, practitioners, and policy makers;
- fostering of an international faculty of rural studies;
- committing to future information sharing;
- contributing to the literature in the field of rural studies;
- stimulating teaching, researching, and funding in tertiary institutions;
- encouraging closer working relationships between scholars, professionals, practitioners and policy makers;
- contributing to cross-disciplinary understanding and cooperation;
- looking back at the last century in order to look ahead to the next.

Because so many of us have our identities and work defined by residence in a discipline, the knowledge, effort and skills needed to engage meaningfully in "interdisciplinary, and intercultural collaborations" requires vision and dedication, not to mention a willingness to move outside our comfort zones. It is less problematic for all of us to write grants, produce papers, and attend conferences when we know the field, the people and the expectations. However, when one chooses to "focus on the cracks," the areas of shared concerns, there is immediately a new audience and a new set of established professional practices with which to contend.

My experience has been that mainstream journals and conferences largely marginalise rural concerns by grouping the papers and presentations in the "not elsewhere" classified category, often with a title involving the word "equity." This conference celebrates our shared concerns over rural and encourages cross-cultural and cross-disciplinary engagement. We may not attain the goals set by the Conference Committee; what is important is the commitment, understandings and processes set in place: this conference is testimony to our belief that these goals are worthwhile.

Now let me focus on the matter of the international network canvassed at the 1994 Conference and raised again in the above objectives of this conference. The following two motions were carried unanimously in 1994:

"That the Conference support the establishment of an international faculty to accommodate undergraduate and post-graduate studies being conducted in a range of institutions concerned with issues affecting rural communities."

"That the Conference support the establishment of an international association of educators, practitioners, scholars and professionals engaged in rural and remote health, education, community and economic development and that a steering committee be established to create the association."

The first proposal has assumed some substance. James Cook University and Malaspina University College commenced in 1997 a partnership program offering a Masters in Education (Rural Studies). This is an honours degree (leading to a doctorate) and involves equally academic staff from both universities in teaching courses and supervising research and thesis preparation. To date 35 Canadian candidates have enrolled and two are about to transfer to the doctoral program. An important exchange of professional interests and concerns is an additional outcome encouraged by inter-institutional visitations (16 separate visits have occurred) and the sponsorship of two formal meetings: one in Townsville in 1997 focusing on doctoral programs and the other in Fiji in 1999 which brought together most of the academic staff involved in teaching and supervision in the joint Masters program. At the doctoral level, one US candidate and three Canadians are supervised jointly by JCU and MUC supervisors. One person, Dr Jim Montgomery from MUC, has completed the PhD award.

It seems that the partnership model is powerful in catering for the needs and interests of all parties, the candidates, the staff and the institutions. Needless to say, teaching at such a vast distance has its problems; however, good will, good humour and good communication do much to sustain candidates and staff. The dropout rate has been remarkably low. Extension of the model to include other universities is clearly possible and the partnership model is recommended to others who may wish to engage in international teaching and higher degree programs.

The second proposal, on reflection, was an idea (an ideal?) before its time. A follow-up study was completed in 1998 and responses to the formation of the international association were equivocal. Generally, the idea was welcomed but concern over "another association," costs and time available to set the organisation in place suggested that there was, at that stage, insufficient commitment to ensure that a new association would draw support and membership from a range of countries and a variety of professions. The proposal was quietly set aside.

Although the formal association did not eventuate, the informal network, especially among key players (mainly presenters at the 1994 Conference), stayed strong and laid a secure foundation of trust, friendship and shared endeavour which seems to be necessary, certainly desirable, from which a more formal structure can be constructed. This conference in Nanaimo is an affirmation of this belief.

The climate in 2000 is different; the interest in this conference from "new" delegates and the continuing participation of the "old" signals an opportunity to revitalise the concept of an international association and infuses it with determination and vigour.

I believe this will happen.
My congratulations and best wishes to Dr Montgomery and the conference team and welcome to all delegates.

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KEYNOTE ADDRESS

Rural Women Teachers in the United States

Andrea Wyman, USA

Thank you for providing me with this opportunity to talk about a subject that is near and dear to my heart, mainly rural women teachers and their history and life accomplishments. I'm a bit like a grandparent when someone asks me anything about the subject. I drag out pictures and provide endless anecdotes. This morning I would like to do both, hopefully without boring you spitless in the process.

As this conference chooses to begin on a note of reflection, "Looking Back: Voices and Reflections," the title of the first session today, and is about rural matters and issues, I cannot think of a more enlivened set of voices to begin with than women in small one-, two-, and three-room schools across the United States.

While educational history books documented rosters of student names and dates and places and schoolhouses and school boards, rural women teachers took the time to write down a very different history. Ironically, it is the type of story we are so longing to hear once again. A history of people, place and community. The social histories that women teachers recorded describe their day-to-day experiences in rural schools with depth and dimension. I believe we have a great deal to learn from these women by looking into their lives and work, and I would like to invite you to join me in meeting them, both verbally and visually.

The historical experiences of America's rural teachers provide fertile ground for learning about networking and developing community and even coping with stress. I will use information from diaries, journals, slides, and photographs to show how America's rural women made a difference in education through the autonomy of having a room of their own, the one-room schoolhouse. Rural women teachers arrived at the helm of America's education movement through unusual circumstances, wars, economic and agricultural depressions, and westward expansions. It was truly a male environment in the earliest classrooms in America, modelled after the Europeans where schoolmasters and school misters ruled in the classroom. Women teachers had their ability to lead tested time and time again. Yet, they rose to the occasion by developing coping strategies that strengthened not only their common drive to provide a solid education for America's youth, but built some of the strongest networks of the time that bound women teachers together as a powerful education cadre.

The first real woman teacher was a school mother. According to the Oxford English dictionary, the term originated in the United States and has a number of grammatical uses. "Schoolmarm" means to guide or instruct in a patronizing manner. Town records kept before the American revolutionary war document widowed or single unmarried women accepting a few pence per week for instructing children in their homes.

In the late 1600's, Widow Penchin's life was not an easy one. She sold gingerbread and cake from her cottage and displayed a sign in her window announcing "School kept here." For Widow Penchin, a number of jobs were required to help her make a living. Taking in scholars, as the children were called in her school, was only one such occupation. By the middle of the 19th century, several women had stepped forward to become leaders, if not legends, in the first educational movement encompassing rural women teachers. Emma Willard, Mary Lyon, and Katherine Beecher served as role models for the first trained rural women teachers. All three women devoted their lives to teaching and advancing higher educational opportunities for everyone, including children and women in their schools. Emma Willard wanted to make advanced classes available to young girls and write textbooks during a time of censorship of women's access to educational materials. Women, it was thought, should not be interested in any subjects as deep or exhilarating as geography, algebra, or politics. She established the Troy Female Seminary for the training of women teachers, which eventually graduated some 12,000 women teachers during a span of 50 years. Mary Lyon fostered an equal blending of religious training with education. She taught under these circumstances and provided just the right opportunity for her students. Women felt their calling to work spreading their religious and moral beliefs to an uneducated and ignorant population. The graduates of Mary Lyon's Mount Holiok Seminary teacher training program stepped into frontier classrooms, carrying a stack of schoolbooks in one arm and a bible under the other. Catherine Beecher provided a formidable role model for the schoolmarm image. Trained at Beecher's Hartford Seminary, (she) recruited young women headed west and served in rural schools. These trainees were advised to establish strict disciplinarian techniques, particularly in the use of the rod for punishment. The girls from Miss Beecher's school also signed a note promising not to marry for at least the first 2 years of their teaching contracts. Harriet Bishop received her first proposal not long after her arrival in St. Paul, Minnesota. A gentleman by the name of Ozzie Owl, she wrote, "has offered me the best corner of his lodge and help from another squaw to handle the chores, and even hush my papoose. I refused his marriage proposal and the next thing I knew Ozzie Owl begged money to buy a new shirt and left."

Following the great land settlements and westward movements of the 1860's the first mass training periods for rural women teachers began. Men left rural classrooms for the settling of the west or to fight in the civil war, thus creating a large demand for women. While mass recruitments of teachers were responsible for placing women in rural schools, perhaps it is important to ask why women would have wanted to go to the wilderness to teach, especially since motivation for women to take a teaching job in the 1840-1860's continued to be interpreted through their preparatory role for motherhood and marriage. The answers are quite varied. Many young women saw themselves going out to civilize the west and were drawn to the opportunity to do God's work. Others began reading dime novels about adventurous women and they wanted to leave as well. Woolen mill closings on the Eastern seaboard in the 1860's left many young women without jobs and school teaching provided a means of gaining respectable white collar work. Others saw the opportunity for adventure, economic stability, marriage opportunities and even work independence, such as Mrs. Lucia Darling, the first school teacher in Montana. One of the earliest recruitments of women teachers was the union missions recruitment under the auspices of the United Foreign Missionary Association, which sent its first group of women teachers to Oklahoma to teach the O'Sage Indians. Western communities also advertised for schools in Eastern newspapers and women were enthusiastically recruited to rural areas to start schools, although a community's enthusiasm might not have been matched by its finances.

This is the ship that women went on when Asa Mercer put an ad in the Boston Globe. He recruited a whole bunch of young women, something like 20 or 30, and they went on a ship through the Panama Canal, around South America and all the way up to Seattle, and when they got there, they didn't realize that there were no jobs for them. He had just simply put an ad in the paper and recruited all these good looking young women to get on the ship with him. They nearly threw him overboard.

"The floors and walls were just plain dirt," wrote Katherine Wiggins in Kansas in 1888, "not even adobe plaster, not one window, and a cellar type door way giving scant illumination." "This is my school," she wrote, "plain benches without backs run across three sides of the room and there is no blackboard or any other equipment." Getting paid was frequently a problem as well, and teachers wrote in their personal journals about having to plead for their money or wait until the school board saw fit to sign their pay checks. Some teachers were even paid with bartered goods. A few chickens, a cord of wood, or exchanges of laundry or ironing. "I was paid $75.00 a month," wrote Cybil Sutherland in 1935, "what was funny at that time was you could never quite get it. They paid you in script, so I'd have to borrow from the bank to tide me over. Sometimes during my pay month the money would come in so I could pay off my bank note. I was really getting less than $75.00 by the time you figured it all out. But it went just as far as what I was making in the end. I paid $20.00 a month board. I paid $20.00 a month car payment. My gasoline was cheap at that time because it was about 12 cents a gallon, so the rest of it was mine to gloriously spend on beauty shop appointments or whatever my little heart desired. My clothes never looked better than they did then. Classroom supplies were often limited. Perhaps a few sheets of writing paper, one pen for a whole room of children, a single slate board or a book brought from home."

Teachers even wrote about having to supply materials for their students out of their own money. Yet thousands of women fill the rosters of northern teachers who signed up to teach freed blacks beginning in 1861 with America's civil war. Beleaguered by swamp snakes, malaria, and fleas; and harassed by the Ku Klux Klan, these northern women teachers numbered nearly 2000.

This is Ida Wells Barnett who actually started out as a school teacher. She rode six miles on a white mule each way to teach school and she did that every day and rode home at night to take care of her four brothers and sisters because her parents had died in a flu epidemic. She taught for about five years and then after that she went on to become a very famous journalist in Washington, DC.

Teachers sent by the American Missionary Association had to possess six characteristics. Missionary spirit, good health, energy, culture and common sense, healthy personal habits, and experience with discipline procedures. Many a rural woman teacher risked being imprisoned for teaching in secret or moonlight schools. These were the first areas of adult literacy and adult education that we see coming from Texas, Kentucky and down south.

Another group of rural women teachers frequently missed in history books were the immigrant mothers who started schools for young children on the plains during the era of America's early land settlements. Seen as a way of maintaining ethnic identity, immigrant schools were established in homes and church basements. Some of the women had teaching experiences before coming to America and many women taught in their native languages. Educating children and settling into a new country went hand in hand. Yet, neither was a simple undertaking, as noted by G. Svensson, whose father had been a teacher in Norway. She wrote in 1875, "the training of children is not an easy task, we are not all able to carry on as we should. When I think of our heavy responsibilities laid upon us, I often become sad and think it best to do as Olly (my husband) once advised me. He said we should rear the children to the best of our understanding and ability, and then leave the rest to him, who said, for of such is the kingdom of heaven."

G. Svensson has one of the most poignant diaries that I have ever read. It's held at the Iowa State Historical Society and in the end I was saddened to read that after having 10 children in 12 years she died giving birth to her last child when she was only 32 years old. Teaching native American children or children of immigrants was another aspect of the rural teacher's daily routine. U. Borne, named Arizona Press Woman of the Year in 1972, taught in the Arizona desert for nearly 30 years and explained her attempts to teach and her efforts to work for children. She remembered her vocation and avocation affectionately as a lifetime spent with kids and cows.

For teachers, bi-lingual programs at that time were simply a part of their daily instruction. Legislation passed in the 1870's ensured a place for women in rural classrooms when local districts across the US were required to provide educational opportunities for every child within a four mile walking distance of their home. This meant that the number of rural schools and teachers had to increase by a factor of 10. Superintendents made their rounds testing would-be teachers. Certificates of varying lengths were given to those who qualified and teacher contracts with specific rules and regulations were issued, although these contract stipulations rarely applied to a woman's teaching ability. Ten rules for the teacher, 1915, New York:

1. You will not marry during the term of your contract.
2. You are not to keep company with men.
3. You must be home between the hours of 8:00 pm and 6:00 a.m. unless attending a school function.
4. You may not loiter downtown in ice cream parlours.
5. You may not ride in a carriage or automobile, unless he is your brother or father.
6. You may not smoke cigarettes.
7. You may not dress in bright colours.
8. You may under no circumstances dye your hair.
9. You must wear at least 2 petticoats and your dress must not be any shorter than 2 inches above the ankle.

As states began to assess their needs for instructors, many districts found themselves woefully understaffed and without adequate buildings and facilities. Policies for granting certificates were sometimes stretched to the limits, or even ignored. Normal schools sprang up in conjunction with state universities and teachers' institutes were offered so students could obtain certification or re-apply for advance certificates. By the late 1880's, 63% of America's teachers were women in the cities and women held 90% of the teaching positions in rural classrooms. The agricultural depression in the 1890's kept women in rural schools, when school boards questioned the importance of paying higher salaries to men. In the early 1900's another student phenomenon was taking place in rural areas. Girls outnumbered boys in public high school attendance. On farms, boys were held back from attending school to assist the farm work and in cities. Boys were encouraged to leave school as quickly as possible to become wage earners. These two circumstances meant that girls and boys were finishing high school at a ratio of three to two.

This shift in the numbers of educated students resulted in the availability of more women for clerical and sales jobs and school teaching. Incidents of salary and contract discrimination were ever present. Male teachers in 1914 in Nebraska were paid $21.89 more per month than women. The average monthly salaries for teachers rose somewhat after World War I; however, men were still paid more than women. To avoid unnecessary expense, school boards regularly fired or failed to rehire experienced teachers and in this way could keep teachers' salaries low. As World War I drained the number of male teachers in the classrooms, the overall supply of rural teachers was barely meeting the demand. In America's one-room schools, women outnumbered their male counterparts by more than eight to one. Women were needed in administrative roles in school districts and many went on to become principals and superintendents. After the great depression in 1929, teachers' salaries plummeted once again and many teachers felt lucky to have a job or be making any money at all. During this era, the ratio of applicants for jobs was 32 to 1.

The great depression in 1929 was, however, a turning point when societal restrictions imposed working restrictions that stipulated that men should be the only employable wage earner in a household. Many women teachers holding administrative jobs or school classroom positions found themselves dismissed and replaced by a man. In later years a shift in numbers was experienced when men went to war and women again resumed the helm of America's rural schools during World War II. It was also during this time period that many districts relaxed their marriage clauses in teacher contracts.

From the very beginning their faces have haunted me, these rural women teachers gazing out of old photographs. Their faces stare boldly at the camera while a moment in time is frozen as the teacher, the schoolhouse, and a swarm of children are captured in brown half tones. Time and time again I sense that these teachers were even staring right at me, their eyes silently engaging mine. More often than not, I found it hard to look away. In photograph after photograph I began noticing that rarely, if ever, did the women teachers turn from the camera's view. Instead they seemed to capture the very heart of the lens, their expressions full faced, solemn and unflinching.

Women moved in and out of educational timelines, depending on land settlements, wars and economic situations. The American government moved forward to assist with rural education by establishing state universities in the 1860's that offered one form of assistance with normal school programs. Teachers were then trained among other things to work with larger, more diverse populations of children and communities, which proved to be a nearly opposite position from the early beginnings of the rural dame teacher. On one hand educational history books rarely make mention of rural women teachers. Yet, this is Sarah Wanamacka, by the way, who did enormous policy rights for the Great Plains Indians. When she simply couldn't get work, she went back to teaching school again.

Yet, careful attention to a variety of materials and particularly local history materials has turned up an amazing amount of information about women teachers. Diaries, journals, letters and correspondence document rural women's work in rural teaching posts across the United States. My own research interests are in the areas of one-room schools today and the Amish classrooms so prevalent in my area of Pennsylvania. Relying on the one-room school model, the Amish still hold to rural education traditions. Stepping into an Amish classroom today is like stepping back in time 150 years, even seeing a horse and buggy hitched beside the building. Few things have changed for Amish schools, their educational goals, their facilities, their curriculum, or their teachers. Even today the female teacher is still the predominant educator for Amish children.

After conducting interviews with Amish teachers in Ohio, Pennsylvania, Indiana and New York, I learned more about their classroom and the way they teach. The strength of the institution of education for the Amish is their ability to stay connected. This is done by mail, publications, Sunday gatherings, and word of mouth. For example, at the beginning of a new school year, a seasoned teacher serves as a mentor and offers advice to the newest members in the teaching community. In a session today, I will discuss in detail what I've learned from the literature about the Amish, their teachers, and their approach to education. I will also discuss some of the ironic similarities between what goes on a typical Amish class room and what is going on today in public schools.

Approximately 324 one-room schools still remain in the United States today. These teachers are now on the internet, and email, and have satellite dishes on their playgrounds. Their concerns are similar to those of their sister teachers almost 100 years ago. Their opportunities are even more similar because of the remoteness of their schools and the extra burdens placed upon rural teachers. Teachers in Montana still have remote school locations where they arrive in September and live in the teacherage during the entire school year, and leave in May. Some schools in Wyoming today also have programs for children and their parents who make the drive to school on Monday and attend extended hours during that week and leave on Thursday evening when they make the long drive home for a 3 day week-end.

What continues to be an important factor for women teachers today, staying on as rural school teachers, is simply a matter of autonomy for their school, their charges, their curricular issues, and discipline. It was as true 150 years ago as it is today. Autonomy seems to be the operative word. Kate Fullerton of Cherry County, Nebraska couldn't have stated it better when she was asked in 1985 what she liked about being a one-room school teacher. Her reply was this, "I like it here," she said, "I like being a teacher in a one-room school. I like driving the bus, doing the cooking, being the janitor, everything. I like the responsibility for the whole shebang."

The names of rural women teachers could fill many a teaching roster. During America's educational hay day, which lasted from the 1860's to the 1940's, one-room schools numbered well over 212,000 and approximately 85% of them were staffed with women teachers. It only seems fitting to conclude this talk by introducing you to some of the most interesting and unusual millennium teachers. They are delightful centenarians who were teachers at one time in their lives. They provide us with a grounding of how human teachers are, and their love for life and learning. First is Leila Denmark, born in 1898. When Leila's beau at the time was undecided about a career choice, she taught school for several years, hoping he would make up his mind. One of the teachers at her training college had provided her with dissecting instruments and she became fascinated with science and medicine. Thus began her long and lengthy history as a physician. When her husband died at the age of 91 she decided that she would continue seeing patients and has office hours, Monday, Tuesday, Wednesday and Friday from 8:30 am to 3:00 pm. When asked if she has plans to retire, she says, "Nope, not until my obituary is in the newspaper. It would drive me crazy if I had nothing to do."

Next is Lois Addey, who was born in 1892 and met her prince charming at a Sunday school picnic. Before she was allowed to marry, her parents insisted that she get a college education. It was something that literally saved her life. When their first child was only 2 years old, a flu epidemic took their little girl and within 6 months her husband was dead as well. Teaching literally got her through the next 10 years and she went on to become a principal. One day, she suddenly received a type written letter from a local banker who was widowed. It said, "would I please correspond with him? Well, I didn't even read that letter for a second. I pitched it in the fire. I wouldn't correspond with Sam or any other man, because I could never love anyone as much as I loved my first husband, Marvin." Fortunately, Lois's mother intervened and out of that initial letter came a new life and a career when she was able to open an art school for children, a long-time dream of hers.

Finally, we come to Hilda and Lena Vangsted, side by side through the years, born in 1901. Except for a seven year separation early in their career as college teachers, identical twins Hilda and Lena spent virtually every day of their lives together. They were identical in every way. Their hairdos, their smiles, their purple outfits, their earrings, their brooches. They were natural teachers. They went on to become college teachers and taught education and psychology and the social sciences. There is one small part that is kind of fun. "I feel sorry for people who don't have a twin," says Lena, "It must be very strange," says Hilda, "People embrace the

Vangsted twins as their own, but now they stare at us even more because we're a couple of old ladies coming along, and they always want to know what the difference is. They say, surely there must be something they disagree about." "Oh I know," says Lena, "she likes Promise margarine," and "Oh, she likes Fleischmann's," says Hilda. "But I'll make the sandwiches and I'll use Fleischmann's on hers sometimes," says Lena, "and she doesn't notice." "I do," says Hilda.

I think about how lucky I've been to study rural women teachers. I feel so often that I met and developed friendships with so many of the women through their diaries and journals. They were a sturdy lot, full of spunk and determination. Their commitment to learning and children never faltered. I believe rural women teachers, their voices, and the body of literature and information that surrounds them are a valuable resource for educators and historians interested in building a new and more enlightened educational history of the United States. Thank you for providing me with the opportunity to introduce you to some of the most interesting, funny, sincere, intelligent, and spunky women in America's historical past.

KEYNOTE ADDRESS

The Real Cost of Rural Secondary Schooling in South Australia (From a School's Perspective)

Mark Witham, Australia

Introduction

This paper examines the costs of rural schooling in South Australia from the internal allocations of resources in four country and four metropolitan case-study schools. The case studies considered only secondary education and the differences between how metropolitan and country schools allocate resources to students, subjects and activities such as administration, resource centre provision and delivery of the curriculum. A second issue was whether the way that secondary schools allocate resources is congruent with how the Government allocates resources to schools.

The methodology used in this study differs from previous studies in two ways:

- It includes all resources available to schools including teachers, goods and services, equipment, learning resources and major capital. Previous studies of within-school resource allocation have relied on the assumption that teacher salaries are the most significant expense (about 80%) and can be used to estimate the total allocation of resources. This study is able to compare the outcome from just using teacher salaries to that obtained by using all resources. It shows that methodologies using teacher salaries only, will understate the differences between year levels and between country and metropolitan schools.
- Resources are allocated to individual students rather than only to subjects. This allows for the reduced number of subjects taken by senior secondary students to be taken into consideration in the costing of year level and individual student allocations. This methodology shows that students studying at senior secondary year levels do not require as high a level of resources as would be assumed from previous studies that allocate only to the subject level.

It is clear that the basis for allocating resources at the system level is not congruent with how schools themselves allocate resources. The particular policy implication of this mis-match for rural schools relates to the allocation of resources to senior secondary students. The system allocation assumes that senior secondary students require significantly more resources than schools actually allocate. Schools re-allocate these surplus resources back to junior secondary students in both country and metropolitan areas. Country schools tend to have relatively lower retention to year 12 and thus have less surplus resources to re-allocate compared to metropolitan schools.

Literature Review

Teacher salaries make up around 60% of school resources (McKenzie, Harrold, & Sturman, 1996, P.50) and these are allocated to students by means of a timetable. Much of the research on within-school resource allocation concentrates on teacher allocations. Curriculum Delivery is the major purpose of schools and represents the largest component of school resource allocation with coincidentally around 60% of resources being allocated to it. (McKenzie,1992, P.170).

McKenzie (1992, P.175) found in New South Wales (NSW) class sizes in small schools for students in years 7-10 were 1.73 times larger than class sizes for students in years 11&12. In medium-sized schools this ratio was 1.45 and in large schools 1.35.

McKenzie believed that this was evidence of cross subsidisation - although this would not seem to take into account the fact that students in senior secondary typically spend an average of 650 hours in a face-to-face learning situation, compared to around 1000 to 1077 in years 7-10 (Abbott, 1999). Abbott's work was in Western Australia, Victoria and South Australia in 1999, and it is possible that McKenzie's sample of New South Wales (NSW) schools in 1990 did not have unsupervised lessons for senior secondary students common in these other States in 1999. If we adjust McKenzie's findings for the class size ratio between years 7-10 and 8-12 to account for the 350 hours pa that year 11 and 12 students are unsupervised, we find a very different result as shown in Figure 1.

This would indicate that in small high schools, junior secondary subsidises senior secondary, but in medium and large high schools the opposite is true.

An important study on within-school resource allocation by Harrold (1998, Pp.150-162) focused on Cross Subsidisation Analysis. He identified free periods in the timetable for teachers as "*a source of slack in the utilisation of staff time*" (1998, p.153). Harrold provided a methodology for determining the equity ratios for secondary year levels that he described for a secondary school in NSW (1998, P.157). This analysis compared the percentage of total teacher periods allocated to each year level and divided this by the percentage of student periods in each year level. Harrold's study aonly considered staff time and did not take into account the reduced contact time for senior secondary students.

A major investigation in 1996 by McKenzie, Harrold, & Sturman found that "*there is a particular concern that rural secondary schools may provide inadequate coverage of several of these (*major curriculum) *areas*" (McKenzie, Harrold, & Sturman, 1996, P.3). The different patterns of resource allocation within rural schools is not just because of the relatively fewer students in these schools - it is also due to the different patterns of teacher specialisation in rural schools compared to larger urban schools, which suggests that the nature of teachers workload varies between different types of schools (McKenzie *et al.* 1996, P.46).

McKenzie *et al.* found that in Australian Secondary Schools, years 11 & 12 were typically provided with a broader curriculum range than junior secondary students, and were taught in relatively small classes by comparatively senior teachers. These allocative decisions translated into relatively high levels of per student expenditure in years 11 & 12. In this sense, they argued, the junior year levels cross-subsidised the program in years 11 & 12 (McKenzie *et al.* 1996, Pp.51). This might not necessarily follow because although classes in years 11 & 12 are more expensive per student, we don't know how many classes year 11 and 12 students have compared to years 8-10. If it were exactly the same for both sectors, then McKenzie *et al.* would be correct, but there is evidence that senior secondary students are not engaged in face-to-face instruction as frequently as students in any other year levels (Abbot, 1999).

McKenzie *et al.* raised the question of "*whether small schools provide a comparatively comprehensive curriculum in years 11 & 12 by means of a relatively narrow curriculum in the junior year levels?*" This question could equally be asked of medium and large schools, and it is also affected by the premise outlined above. After allocating the non-teaching time of teachers (a little over 40%) to year levels on the basis of what subjects the teachers taught, they found that in schools with 300 or more students the level of cross subsidisation was the same for rural and urban schools. Below this, the cross subsidisation was around 40% - meaning that for every $100 spent in years 8-10, $140 was spent in years 11-12 (McKenzie *et al.* 1996, Pp.52-57).

Using the methodology of weighting teacher salaries to year levels based on class size, McKenzie *et al.* found that years 8-10 in rural schools were about 2% more expensive than in urban schools – when only considering teacher salaries. Years 11-12 were 27% higher in rural areas (1996, P.53). It is likely that any adjustment based on a methodology which took into account the differential in the number of lessons between junior and senior secondary, would reduce the 2% for years 8-10 and increase the 27% for years 11-12. There are very few schools where the cost per student is significantly higher than urban schools so in aggregate these higher expenditures are very small (McKenzie *et al.* 1996, P.60, Table 4.5).

An important paper from the United states by Monk, Brent, & Roellke, (1996) investigated "*the resource flows at micro-levels of educational systems*". Monk *et al.* distinguished between two major policy issues "*1) concerns over productivity or efficiency in education; and 2) concerns over equity and adequacy in the distribution of educational opportunities*".

Monk *et al.* warned that "*the omission of these important pools of resources limits the ability to gain a comprehensive understanding of resource allocation phenomenon.*" This study provided a useful separation of "*disposition*" and "*utilisation*". Disposition refers to the intended allocation of resources such as a teacher being allocated to a class. Utilisation refers to "*the allocation of student time and effort*" such as the funding per student within a class of 20 students. For example English and mathematics have the highest "*resource intensities,*" with 5.48 and 4.65 teachers per 1,000 district pupils, respectively. This gives a picture of the resources allocated to different curriculum areas, or the disposition. By examining how resources are utilised it can be shown that English receives 15.8% of the available teacher resources and 16.6% of the total number of student hours. Thus English receives a smaller share of the available teacher resource than it receives of the available student resource.

Methodology

Four metropolitan and four country Government schools in South Australia were selected using a structured sampling process, which encompassed a range of school sizes and geographic locations.

Studies by McKenzie *et al.* (1996, P.53), Harrold (1998, Pp.150-162) and Monk *et al.* (1996) considered the allocation of staff resources to subjects, but not to individual students. These studies compared resource levels for students across different subjects, but did not allow a profile of the costs for individual students to be determined. These studies also appeared to have a methodological deficiency in that they did not consider that some students attend for fewer hours than others. This meant that comparisons across year levels could be flawed if some year levels were more likely to have either or both free (unsupervised) lessons or part-time students. This study seeks to extend these methodological approaches by considering all resources within schools. This study tests the assumption that because salary expenditures make up the vast majority of the resources within a school, they can be used as reliable approximations of total resource allocations to subjects and students.

The approach has been to cost all resources used by the schools, which are called inputs. These were grouped into the following broad categories including salaries, utilities, maintenance and cleaning, cash grants and capital and land expenditures. Expenditures incurred by parents including in-kind support have not been quantified.

Expenditures were allocated to individual students. The per-student expenditures were then aggregated to calculate expenditures per subject and expenditures per year level. The methodology was to separate each input-expenditure into curriculum, administration, library, transport and grounds.

Figure 2 shows the relationship between inputs and outputs in this costing methodology. The majority of inputs are allocated to more than one output. (Note there is no significance in whether inputs are to the left or right of the outputs). The methods of calculating each input expenditure category and the way they are then allocated to outputs are now described.

Findings - Teacher's Work

It is apparent that country teachers spent more time teaching classes (76%) than metropolitan teachers (68%). If we compare the total time for all staff who were able to teach in these schools, country staff taught 72% of the total lessons they could possibly teach, compared to 66% for metropolitan teachers. Country teachers had less preparation time scheduled within the school timetable and were less often assigned to other non-instructional duties compared to metropolitan teachers. These findings are similar to the findings of McKenzie (1993) McKenzie *et al.* (1996, P.50) and Grissmer *et al.* (1997), who all found that secondary teachers were allocated to teaching duties 60% of the time.

As schools get larger the economies of scale allow larger classes on average. Larger classes require overall less teaching staff to instruct than the smaller classes more common in country schools. As larger metropolitan schools require less of their teaching staff to be involved in face-to-face instruction, they are available for other duties. Metropolitan teaching staff were available for 4% more of their time for other duties than were country teaching staff. This is a valuable resource that could be used to organise Vocational Education and Training (VET) in schools and other programs to the benefit of metropolitan students.

Class Sizes

The trend is for relatively smaller classes to be provided in country schools. The average class size can be calculated by weighting each class size category by the number of classes. This will provide the average class size without allowing for the reality that some classes are for 1 hour per week and others are for 5 hours per week. If we weight each class size category by the number of student hours for each class a more useful comparison of class sizes can be made. Figure 3 shows the average class size calculated by each method as well as the relative differences between these two calculations:

The differences using number of classes as a weighting shows a much smaller average class size in country schools compared to metropolitan - 15 in the country compared to 20 in the metropolitan schools.

The ratio between the two methods of calculating class size also revealed a significant difference between country and metropolitan schools – which implies that small classes in metropolitan schools operate for less time on average than those in country schools. A large number of small classes in country schools operate for the same time as any other subject, whereas in metropolitan schools, these subjects operate for fewer hours each week on average.

Input Costs

Country schools had relatively more capital and busing expenditures than metropolitan schools. This results in salaries being about 10% less in country schools as a percentage of total resources. The most striking difference between country and metropolitan schools is the difference between the proportion of total staff allocated to teaching duties as shown in Figure 4.

Output Costs

The discussion relating to inputs simply described what resources were provided to schools. It did not provide any insights into how resources are deployed within schools. The outputs or activities examined in this study are defined as follows:

Teaching to students in formal lessons, preparing for lessons and undertaking activities directly related to the teaching and learning process. This may include a range of activities such as organising work placements, maintaining the agricultural assets of the school and supervising lunch and recess breaks and providing pastoral care. It includes time by school support officers allocated to preparing laboratory lessons and supporting students with disabilities

Includes all time spent by school principals not teaching or preparing for lessons. It includes time of other leadership positions allocated to administration and time of school support officers in running the office and book room functions. It also includes time spent by school support officers, assisting teachers by photocopying curriculum materials

Library
Includes all time spent by teachers, teacher-librarians and school support officers in operating the resource center of each school. It does not include class lessons which are scheduled to the library.

Student Transport
Includes school bus expenditures and conveyancing allowances paid to parents.

Grounds
Includes all expenditures which relate to the upkeep of the grounds of each school. It does not include

maintenance of buildings or other infrastructure, nor the upkeep of agricultural assets.

Community Library
Includes all expenditures which relate to the upkeep of the grounds of each school. It does not include maintenance of buildings or other infrastructure, nor the upkeep of agricultural assets.

Includes all expenditures which relate to the provision of library facilities for the general public, which includes a proportion of library staff time - related to Saturday mornings and week nights.

Unallocated
A small amount of resources could not be allocated to particular activities, for reasons which relate to the costing methodology

The allocation of both total resources and salaries only to each of these outputs is shown in Figure 5.

The rationale for including student transport expenditures in the comparison of metropolitan and country schools is that transport is a substitute for the capital expenditures required to build a school. The using-up of capital resources is included in both metropolitan and country schools. It appears that transport costs are not substitutes for capital costs that would be incurred in metropolitan schools, but are in addition to capital costs associated with all schools. It is important to note that the comparison of capital inputs costs showed that metropolitan school capital costs were 2% less than for country schools. So far this analysis has examined output costs as a percentage of the total resources for each school. The following examines output costs from a per-student perspective.

Per-Student Output Cost

The allocations for community library do not relate directly to students in the schools. Figures 10 and 11 show the per-student allocations for metropolitan and country students respectively.

The per-capita allocations of resources to country students is greater than to metropolitan students, however the significant differences are not in curriculum delivery costs, but more in administration, grounds and transport outputs. If we compare the differences between total resources allocated to curriculum we see a greater difference than if we only compare salary expenditures. The allocation of total resources to administration is 18% on average. If we only consider salary expenditures we find that 15% of salaries are allocated to administration. This is not as high as the 40% 'administrative blob' referred to by Wenglinsky *et al.* (1997), which included the provision of meals, and not as low as the 10% found by Odden *et al.* (1995, P164) which included district level administration.

The differences between metropolitan and country schools are much less when we only examine salary resources. This emphasises the value in a methodology that allocates all resources. The impact of this comparison is summarised in Figure 12, which shows the additional allocations to country schools compared to metropolitan, using both salary and total resource approaches.

To interpret the numbers in Figure 26, consider Administration Expenditures - salary expenditures on administration are 24% greater in country schools whereas all resource expenditures are 31% greater. The difference in curriculum salary-expenditures per student for country and metropolitan students is close to zero. This is a surprising outcome arising from the inclusion of some primary students in three of the four country schools. This masks the true differential between country and metropolitan staffing costs per secondary student. To consider the differences in costs relating to secondary students only, it is necessary to fully allocate all resources in each school to the individual students. The 123% differential for all resources, less community library, becomes 133% once primary students are removed from the analysis.

Individual Student Expenditures

The total expenditures in each school have been allocated to individual primary and secondary students. Figure 13 shows the differences between country and metropolitan students using this analysis.

Figure 13 shows the difference between metropolitan and country schools where the vast majority of metropolitan students are allocated between $3,000 and $10,000 each. Country students have a much flatter distribution with a significant 'tail' of students being allocated more than $10,000 and up to $41,000. The most expensive individual students were senior secondary students undertaking the majority of their subjects in a school but via distance education. The highest cost individual also travelled by bus and her parents were paid a conveyancing allowance to travel to the bus stop.

Year Levels

The expenditures per student by year level are shown in Figure 14. This shows that years 9,10 and 11&12 are more expensive than year 8, in most schools and that overall years 11&12 are significantly greater in country schools than in metropolitan.

Subjects

The costs of individual subjects can be examined from different perspectives. The raw cost per subject analysis shows that that maths and science are generally more expensive to provide in the country schools. English and Society and Environment (SOCE) are less expensive to provide. Overall junior secondary subjects are 5% more expensive to provide in country schools and senior secondary 6% less expensive. Overall there is not much difference between the expenditures at a per-subject level.

If we consider the subject cost per student we find that overall junior secondary subjects are 19% more expensive in country schools and senior secondary 69% more expensive compared to metropolitan schools. This is due to class sizes in junior secondary being 19% smaller in country schools and secondary classes 58% smaller on average. A more useful comparison is the cost per student hour as it takes account of both class size and time per week differences. This analysis found that junior secondary subjects are 11% more expensive to deliver per student per hour in country schools and senior secondary 74% more expensive. Almost all subjects are more expensive in the country using this measure. The few subjects where it is less expensive in the country include junior secondary agriculture and 'other' as well as geography and health and personal development in both junior and senior sectors. These represent a very small minority of the total subjects examined.

Comparison of Within-School to System Resource-Allocation Policy

A separate analysis of the implicit resource allocation policy by the South Australian Department of Education Training and Employment found in 1997/98 that the allocations for year levels was significantly different to the apparent policy within schools. This is the case for both metropolitan and country schools as shown in Figure 15

Figure 15 presents evidence of two mis-allocations of resources. First the allocations to year levels do not accord with school practice nor the educational theory relating to year level funding (Caldwell, 1996; Odden and Picus, 1992 ; Caldwell, 1993; Cooper, 1992, Gammage, 1999, p.1)

The second issue is that there are apparent differences in how country and metropolitan schools allocate resources internally, that are not reflected in the resource allocation methodology.

It appears that secondary schools are generally allocated more resources than necessary for senior secondary years. Both metropolitan and country schools re-allocate these resources back to the junior secondary years. However the capacity for country schools to do this is less than metropolitan schools, because retention of students to years 11 and 12 is less in country schools.

This reflects a relative disadvantage for country secondary schools. It is also inefficient for a system to allocate resources to junior secondary students based in-part on senior secondary student numbers.

Conclusion and Summary

The methodology used in this study shows that consideration of total resource allocation will yield different findings to analysis based on salary expenditures only. The key differences are that salary expenditure tends to overstate the amount of resources allocated to curriculum delivery and support, and understate administration and transport. More importantly the differences between metropolitan and country schools are much less if we only examine salary resources.

Overall years 9,10 and 11&12 are more expensive than year 8, and the expenditure per student in years 11&12 is significantly greater in country schools than in metropolitan. The comparison of costs per student shows that junior secondary subjects are 19% more expensive in country schools and senior secondary 69% more expensive compared to metropolitan schools. This is due to class sizes in junior secondary being 19% smaller in country schools and senior secondary classes being 58% smaller on average. It appears that small classes in metropolitan schools operate for less time on average than those in country schools. A large number of country small classes operate for the same time as any other subject, whereas in metropolitan schools, these subjects operate for fewer hours each week on average.

The differences in costs between country and metropolitan schools are not uniform across all subject areas – some subjects are less expensive in country schools others more expensive. However if we look at the cost per student per hour of subject delivery we find that junior secondary subjects are 11% more expensive to deliver per student per hour in country schools and senior secondary 74% more expensive. Almost all subjects are more expensive in the country using this measure. The few subjects where it is less expensive in the country include junior secondary agriculture and 'other' as well as geography and health and personal development in both junior and senior sectors. These represent a very small minority of the total subjects examined.

There is evidence of a mis-allocations of resources. Schools allocate relatively fewer resources to senior secondary years than what is implicit in the systemic allocation of resources to schools. School practice is thus more aligned with educational theory relating to year level funding discussed earlier in this paper.

The mis-match of system resource allocation with what schools actually do creates an equity issue between country and metropolitan students. The system assumes that senior secondary students require significantly more resources than what schools actually require. Schools re-allocate these surplus resources back to junior secondary students in both country and metropolitan areas. Country schools tend to have relatively lower retention to year 12 and thus have less surplus resources to re-allocate compared to metropolitan schools. This reflects a relative disadvantage for country secondary schools. It is also inefficient for a system to allocate resources to junior secondary students based in-part on senior secondary student numbers.

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Figure 1: Class Size adjusting for unsupervised lessons

School Size	Average class size years 7-10	Average class size years 11-12	Class Size ratio	Contact hour adjustment - years 11 & 12	Adjusted Class Size ratio
Small	21.1	12.6	1.67	19.38	1.09
Medium	23.5	16.1	1.46	24.77	0.95
Large	24.5	18.1	1.35	27.85	0.88

Source: from McKenzie (1992, P.175) The contact hour adjustment simply multiplies the average class size for year 11 and 12 students by 1000 hours and divides by 650 hours.

Figure 2: Linking Inputs to Outputs

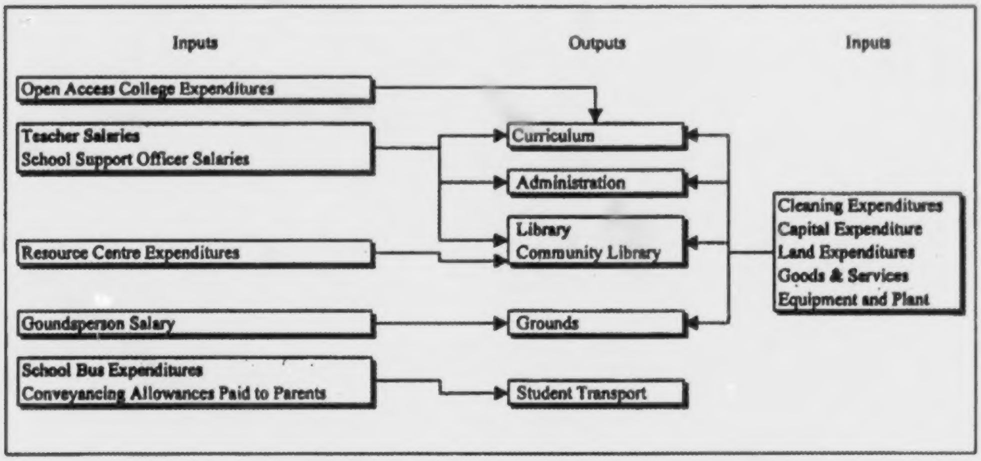
Inputs
Outputs
Inputs
Open Access College Expenditures
Teacher Salaries
School Support Officer Salaries
Resource Centre Expenditures
Goundsperson Salary
School Bus Expenditures
Conveyancing Allowances Paid to Parents
Curriculum
Administration
Library
Community Library
Grounds
Student Transport
Cleaning Expenditures
Capital Expenditure
Land Expenditures
Goods & Services
Equipment and Plant

Figure 3: Calculation of Average Class Size by Different Methods

School Number	School	A - Average Class Size Weighting by No. of Classes	B- Average Class Size Weighting by Student Hours	Ratio of A:B
	Metropolitan	19.99	22.02	91%
	Country	14.98	20.84	72%
	All Schools	18.58	21.75	85%

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Figure 4: Comparison of Input Salaries

	Metropolitan	Country	All Schools	Metropolitan	Country	All Schools
Teaching	$10,796,811	$3,597,676	$14,394,487	80%	69%	77%
Administration & Leadership	$1,905,828	$1,047,749	$2,953,577	14%	20%	16%
Library	$449,848	$257,070	$706,918	3%	5%	4%
Grounds	$131,273	$143,176	$274,450	1%	3%	1%
SSO	$184,563	$88,150	$272,713	1%	2%	1%
Community Library	$-	$54,926	$54,926	0%	1%	0%
Total	$13,468,324	$5,188,747	$18,657,071	100%	100%	100%

Figure 5: Comparison of Output Expenditures using All Resources and Salaries Only

	All resources	Salary Resources Only	All resources	Salary Resources Only
Curriculum	$ 21,472,780	$15,815,225	74%	80%
Administration	$ 5,081,944	$ 2,953,577	18%	15%
Library	$ 1,212,242	$ 706,918	4%	4%
Student Transport	$ 637,831	$ -	2%	0%
Grounds	$ 310,083	$ 274,450	1%	1%
Community Library	$ 121,506	$ 54,926	0%	0%
Unallocated	$ 41,220	$ 9,220	0%	0%
Total Recurrent Expenditure	$ 28,877,607	$19,814,316	100%	100%

The differences are that salary expenditure tends to overstate the amount of resources allocated to curriculum delivery and support, and understate administration and transport. The above analysis is now examined for metropolitan (Figure 6) and country schools (Figure 7) separately.

Figure 6: Output Analysis for Metropolitan Schools

	All resources	Salary Resources Only	All resources	Salary Resources Only
Curriculum	$14,475,589	$10,972,154	78%	82%
Administration	$3,218,709	$1,905,828	17%	14%
Library	$732,335	$449,848	4%	3%
Student Transport	$1,480	$-	0%	0%
Grounds	$157,123	$131,273	1%	1%
Community Library	$-	$-	0%	0%
Unallocated	$19,243	$1,433	0%	0%
Total Recurrent Expenditure	$18,604,478	$13,460,536	100%	100%

Curriculum expenditures account for a greater percentage of total resources in metropolitan schools than for country schools. This is largely explained by student transport and community library expenditures accounting for 7% of country school resources.

Figure 7: Output Analysis for Country Schools

	All resources	Salary Resources Only	All resources	Salary Resources Only
Curriculum	$6,997,192	$4,843,071	68%	76%
Administration	$1,863,236	$1,047,749	18%	16%
Library	$479,907	$257,070	5%	4%
Student Transport	$636,351	$-	6%	0%
Grounds	$152,960	$143,176	1%	2%
Community Library	$121,506	$54,926	1%	1%
Unallocated	$21,977	$7,787	0%	0%
Total Recurrent Expenditure	$10,273,129	$6,353,780	100%	100%

Figure 8 shows the allocation of inputs to outputs on a per-student basis:

Figure 9: Per-Student Allocations of Outputs - All Schools

	All resources	Salary Resources Only
Curriculum	$5,099	$3,756
Administration	$1,207	$701
Library	$288	$168
Student Transport	$151	$-
Grounds	$74	$65
Community Library	$29	$13
Unallocated	$10	$2
Total Recurrent Expenditure	$6,858	$4,705
Total less community Library	$6,829	$4,692

Figure 10: Per-Student Allocations of Outputs - Metropolitan Schools

	All resources	Salary Resources Only
Curriculum	$4,959	$3,759
Administration	$1,103	$653
Library	$251	$154
Student Transport	$1	$-
Grounds	$54	$45
Community Library	$-	$-
Unallocated	$7	$0
Total Recurrent Expenditure	$6,374	$4,611
Total less community Library	$6,374	$4,611

Figure 11: Per-Student Allocations of Outputs - Country Schools

	All resources	Salary Resources Only
Curriculum	$5,416	$3,749
Administration	$1,442	$811
Library	$371	$199
Student Transport	$493	$-
Grounds	$118	$111
Community Library	$94	$43
Unallocated	$17	$6
Total Recurrent Expenditure	$7,951	$4,918
Total less community Library	$7,845	$4,875

Figure 12: Comparison of Additional per-Student Allocations for Country and Metropolitan Schools

	All resources	Salaries
Curriculum	109%	100%
Administration	131%	124%
Library	148%	129%
Grounds	220%	246%
Total Recurrent Expenditure	125%	107%
Total less community Library	123%	106%

Figure 13: Comparison of Distribution of Students by Resource Categories in Metro and Country Schools

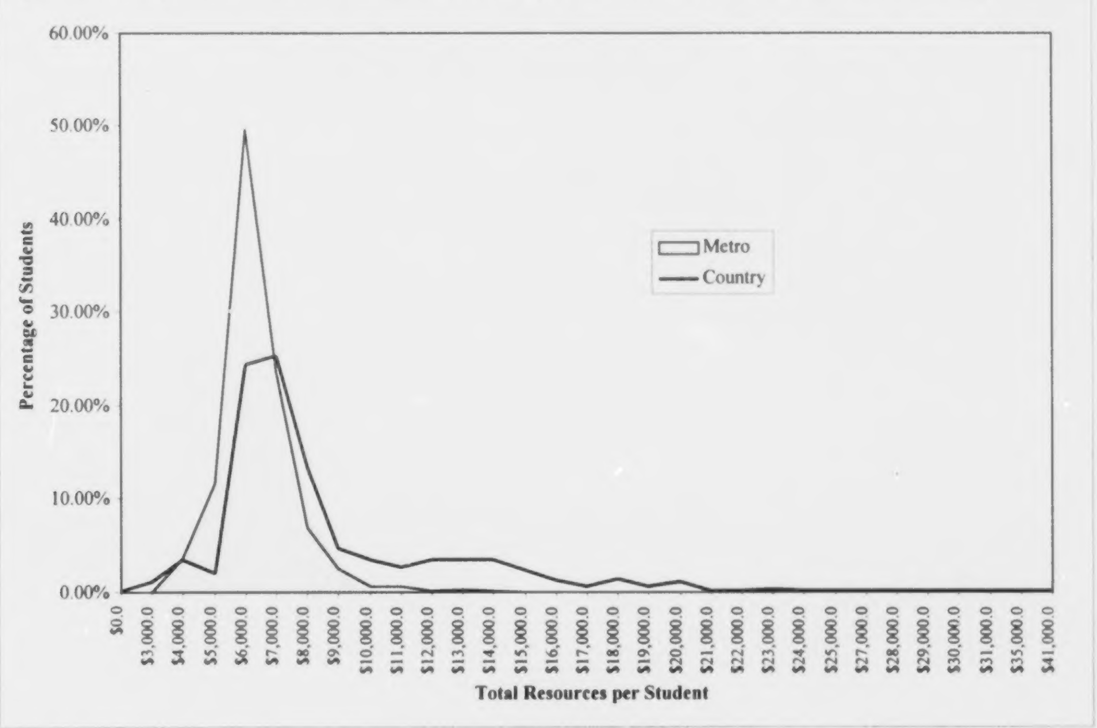

Figure 14: Cost per Student by School and Year Level

School	8	9	10	11&12	Sum 8-12
Country	$ 7,465	$ 7,972	$ 8,396	$ 10,434	$ 8,768
Metro	$ 6,068	$ 6,119	$ 6,341	$ 6,748	$ 6,367
Total	$ 6,381	$ 6,592	$ 6,773	$ 7,601	$ 6,920
Country	100%	107%	112%	140%	117%
Metro	100%	101%	105%	111%	105%
Total	100%	103%	106%	119%	108%

Figure 15: Comparison Between Secondary Year-level Funding Relativities

Year Level	Implicit Corporate Resource Allocation	Case- Study Relativities All Schools	Case- Study Relativities Country Schools	Case- Study Relativities Metro Schools
8	100%	100%	100%	100%
9	100%	103%	107%	101%
10	100%	106%	112%	105%
11	218%	119%	140%	111%
12	218%	119%	140%	111%

KEYNOTE ADDRESS

Annenberg Rural Challenge: School Reform From A Slightly Different Point of View

Paul Nachtigal and Toni Haas, USA

In 1995, we were asked to help design, establish and run a five-year private foundation to promote school reform in the rural US, with 50 million dollars of money donated by philanthropist Walter Annenberg as part of a larger, 500 million dollar challenge grant to the nation. Frankly, the rural project was an afterthought; initially Mr. Annenberg intended his money to benefit large urban cities including New York, Philadelphia, Chicago, Los Angeles, and the San Francisco Bay Area. When a number of rural advocates pointed out that a quarter of the children in the US attend rural schools, the Annenberg Rural Challenge was created as the only national effort. The terms of the agreement were that we would match Annenberg's money, dollar for dollar, from a balance of public and private sources. The effort was governed by a 20 member Board of Directors, selected to represent rural advocates, educational reformers, rural educators, and the diversity of people who live in the rural US.

We came to this effort with 70 + or - years of experience working in school reform in state education agencies, major foundations, the federal government, and most recently 15 years running the Rural Institute for the federally supported Mid-continent Regional Education Laboratory. We were persuaded that (1) rural schools and communities had not been well served by the urban/industrial model of education which had evolved over the past 100 years and, (2) that the nature of rural schools and communities was such that traditional approaches to school reform were not appropriate. The industrialization of public education had driven a wedge between schools and communities which historically were tightly linked. The agenda for the public schools was more and more serving state and national interests rather than those of local places. We were also persuaded that quality rural schools needed to reside in strong viable communities. And, if rural communities were to remain healthy and sustainable, they needed to be served by good schools. Schools and communities needed to grow better together.

Our sense that the Rural Challenge should pursue an alternative approach to school reform did not result from our experience alone. Thomas Berry was talking about paradigm shifts. Oscar Kwagley, co-director of a Rural Challenge supported effort in Alaska, talked about the need for an alternative "world view." Human beings make sense by shaping frameworks, native healers call them stories, for understanding our experiences, then these frameworks, these stories shape us.

Over the past century, the story we have told ourselves about how and what we teach our children, and why we teach what we do, has been based on rational, technical, mechanistic ideas borrowed from the Industrial Revolution. Students were interchangeable units, to be "processed" in age-alike groups at the least cost, turned into productive workers (and tax-payers). The press has been toward a standard curriculum, divorced from any local variation, and an emphasis on private benefit.

Many Americans–typically the most advantaged and powerful–take the common good to mean an aggregate of the actions of self-interested individuals who are free to be guided by such marketplace values as competition and the accumulation of social and material resources. For them, school reform would bring policies and practices that allow individuals to exercise their preferences, maximize their private and unequal resources, and compete effectively. (Oakes, Quartz, Ryan & Lipton, 2000)

We are present at the creation of a new story. Capra describes it as, "A quiet revolution in the way that we view relationships in the natural world–from microorganisms to whales to human society–(that) underlies all modern conversations about ecology and the environment...The main challenge of our time is to create and nurture sustainable communities" (Capra, 1994).

The Rural Challenge

Guiding the Rural Challenge's efforts to create a new story for rural school reform was its mission statement: "To encourage and support good schools becoming public institutions, serving and served by their communities." Indicators included working together on the capacity to live well sustainably, action on the belief that every person contributes to our shared future, and connecting to local natural and cultural resources.

To achieve this mission, three interdependent program areas were created: a program of grants that would create a living laboratory of examples that could inspire others.

To reduce the effects of rural isolation, we funded only clusters of schools and communities willing to work together. We began with places where there was evidence of work in progress that the Rural Challenge funding could expand or make more powerful, funded the expansion of some existing work that encouraged local student writers and artists, and eventually made grants to places with the will but not the wherewithal to do community-based work. The Rural Challenge to date has made grants in 39 of the 50 states in the amount of $37 million, and has helped local people raise a matching amount, bringing more than $74 million directly to rural students, teachers, and classrooms.

A policy program to build the capacity of rural people to advocate on their own behalf for public policy that supports rural schools and communities. The policy program has funded citizen organizing efforts in half a dozen states. It also holds hearings and symposia (face to face and through the internet), publishes a monthly newsletter to recruit policy action across the country, and sponsors a series of white papers, how-to booklets, and basic research studies.

A program of public engagement, to change widespread assumptions about the quality of rural education, the essentiality of rural places, and the need for a post-industrial story to re-form education. The public engagement program actively seeks new allies (recently for a nation-wide arts program and another with an environmental organization, the Nature Conservancy). It convenes regional, national, and topical meetings, expanding the circle of people involved with the work well beyond those who receive funding.

What became very clear early on, was that our efforts to create new stories about rural school reform engaged the Rural Challenge nationally and Rural Challenge sites locally in an ongoing battle around values. Values concerning the purposes of education. Values around who's interests get served by the public schools. And values around who gets to say, who gets to make decisions about public education.

These battles, these conversations about values, are playing out in more than 700 school and communities across the United States in some- times subtle and sometimes very overt ways. The focus of these conversations, for the most part, stem from concrete examples of students engaged in learning activities that address real issues in the local context, that are cross disciplinary, and that result in a product which contribute in some way to the life of that community.

Our vision of reform is organic, indeterminate, open-ended and holistic. Place-based education is the way we've described this work. It includes five thematic areas (the natural and built environment, the economy including entrepreneurship education or how to create jobs, local history and culture, and civic engagement). These thematic areas, if thoughtfully done, can incorporate much of what is considered a "traditional" curriculum. Central to the work of teachers is re-framing the curriculum in such a way that the important skills and knowledge are learned in the context of doing real work about issues which are important to the local community setting.

The power of the work is in the synergy among the themes.

Stories from the Rural Challenge

The real measure of the organization's success is in the behaviour of students, teachers, administrators, community members, and policy makers. We'd like to tell you brief stories from the real world. The Cultural Component of Place-Based Education. Nothing in my education prepared me to believe, or encouraged me to expect, that there was any reason to be interested in my own place. If I hoped to amount to anything, I understood, I had better take the first road east out town as fast as I could. And, like so many of my classmates, I did (Gruchow, 1995).

Cultural history is empowering. In order for rural students to invest in their rural place, they need to believe their rural place has value. And that being from that place validates who they are as well. It is important to be able to brag about the place we come from, but if we don't know the cultural history of our place, our voice stays silent and our feet move on. Students at Rural Challenge gatherings brag about their places, their rural culture: "We are the catfish capital of the world." "We have the best water in the state." "This is the friendliest place in the state." "We have the windiest river in the country." "We have the loveliest sunsets in the world." Education that is place-based sings regional folk songs, reads local authors, documents ethnic histories, records the stories of community elders, and views local citizens as unique and precious resources.

Mexican American students in border towns of Edcouch and Elsa, Texas, were stunned when their history books omitted any mention of them and what they experienced as a vibrant culture. "What about us?" they asked, "Weren't we here too?" Filling the gap in mass-produced books meant filling the halls of the school with art, photographs, quilts and other artifacts detailing local history. In the process, elders were interviewed and invited into the schools to share their wisdom. Schools became community centers, hosts to the rich but missing history, and the students went on to win prizes from the Texas State History Association for their work, available electronically on their website.

In Anderson Valley, California, part of the North Coast Rural Challenge Network, a group of junior high students have created The Oral History Project. They spent a year and a half getting to know the town's elders, and collecting their stories. The students learned digital recording techniques and spent seemingly endless hours transcribing their interviews, scanning historical and contemporary photos, and laying out the 112 page book entitled Voices of the Valley Volume I. (Volume II is currently underway with a group of ninth graders at the helm.) CDs, records, and films have followed. While the work was in progress, several of the interviewees died. Students attending the funerals of their new friends were sobered when reflecting on the timing and importance of the record they had created, and stirred to renewed efforts to know and be known by community elders.

The Civic Engagement Component of Place-Based Education

A public needs regular opportunities, occasions, meeting, or "space", to do its work; it also needs open channels of communication that are linked to crosscutting networks. Communities must have places where different people can talk about common problems--either formally, in town meetings or forums, or informally, in one-to-one or small-group conversations. These places are essential for generating political will, solving public problems and, most of all, creating citizens (Mathews, 1996).

Community health issues, youth centers, local news reporting, and social services are all elements of community building and civic engagement. Community needs can be met and common problems solved when community members team together. Local citizens know best the needs of their community; they need opportunity and space to share those needs, brainstorm possible solutions, and develop action plans. Place-based education often helps to create forums for civic engagement.

Bibb Graves School serves 450 students in grades K-12 from Millerville, Alabama and several other small communities in Clay County. Located some distance from the county seat where the only local newspaper is published, the school and its community was under-represented in the pages of that paper and all but absent from other newspapers and news sources, except for school sports and the rare but extreme incidents of crime. In response to this, The Community Connection, a newspaper written, designed, and laid out by students was begun with the help of the Program for the Academic and Cultural Enhancement of Rural Schools (PACERS). The Community Connection is a monthly newspaper and covers the school and rural east central Alabama community the school serves.

The ability of the student staff of The Community Connection to cover the serious news of the community, both negative and positive, has made the newspaper important in the community in the fundamental way the media works in a democracy. In addition to the production of The Community Connection, students from Bibb Graves School regularly contribute to the county paper and are by-lined as correspondents. The mission statement, composed by the first staff, is as follows: The Community Connection is a student publication serving Bibb Graves School and the communities from which its students come. The purpose of the paper is to train students in journalism, graphic art, entrepreneurship, and in the responsible expression of ideas, beliefs and creative vision. Our goal is to inform and entertain the citizens of our larger community, to provide an open forum for matters of concern to all, and to promote good will.

Students involved with The Community Connection report being more confident about writing and more aware of newspapers in general. Students on staff develop skills in dealing with local government officials and business owners. School relations with the community have been improved by the newspaper because the work is known to be that of students. "I can't believe kids can do all that" is one familiar comment; "It's a real newspaper," is another.

The Ecological Component of Place-Based Education

I once knew an educated lady, banded by Phi Beta Kappa, who told me that she had never heard or seen the geese that twice a year proclaim the revolving seasons to her well-insulated roof. Is education possibly a process of trading awareness for things of lesser worth? The goose who trades his is soon a pile of feathers (Leopold, 1987).

Perham, Minnesota is a lakes area. Recently, as a service to the area lakes landowners, a group of Perham students took water samples from the local lakes. In addition to saving the city and landowners money, some of the results were alarming. The results of the student's testing showed high levels of run-off from area farms and nearby factories. As a result of their research and findings, students testified before the legislature and helped influence safe water policies.

The Yampa Valley Legacy Educational Initiative involves four school districts in Northwest Colorado. These districts span the entire length of the Yampa River, from the headwaters in Flat Top Wilderness Area to its confluence with the Green River on the Colorado/Utah border. The bio-region of this river valley is increasingly becoming the focus of study for the students in these districts. The full range of issues facing mountain communities are present with the often conflicting interests of land developers, environmentalists, ranchers, miners. The Initiative is designed to preserve the legacy of the

Yampa River Valley by engaging the students in understanding the area economically, ecologically, socially, historically as well as appreciating the beauty of the region.

The Economic Component of Place-Based Education

Rural children have been educated to believe that opportunity of every kind lies elsewhere and that the last half century's rural experience of failure and decline has been largely due to the incompetence, or irrelevance, of rural people (Gruchow, 1995, p 91).
Students at Howard High School in Howard, South Dakota (part of the Program for Rural School and Community Renewal) conducted a local cash flow study that drastically affected spending in their community. The Rural Challenge Evaluation Team describes this study as follows: Place has become more dominant in the curriculum of Howard High School as a result of the phenomenal impact of an initial inquiry into the spending patterns of local residents which resulted in increased spending within Miner County [South Dakota] by 27%, an amazing $15,600,000 impact. Acting on a report from the city council that revenue from taxes was declining below that needed to provide community services, Future Business Leaders of America students designed and conducted a community survey and analysis to determine whether and/or where taxable income was spent--in the town, county, or elsewhere. Not only did the results inform students and local citizens where their disposable income was being spent, it also raised concerns about the local economy. Students found that residents were regularly driving to Sioux Falls, an urban center miles away, to avail themselves of a greater number of choices and often the cheaper prices that the chain stores could offer. When store owners, businesses and community members were sensitized to the potential gains that would come from residents spending just 10% more in their county, changes were made by both sellers and consumers. This all occurred in a year in which 100 workers were laid off by the sole manufacturer and largest employer in Miner County. This increased tax revenue boosted support for essential county services, providing hope that Miner County residents can stem the tide that is disintegrating rural communities in the heartland (Learning in Place, 2000, pp 34-35, 37).

The Entrepreneurial Component of Place-Based Education

Understanding where we are and how we got there are only the first two steps. We also need to help young people understand how to create different futures for themselves. Rural schools should teach how to create jobs, not just how to get jobs working for someone else. Entrepreneurship education is vital to the survival of rural communities and can be offered as a community service to all citizens (Haas & Nachtigal, 1998).

Students with entrepreneurial experience gain self-confidence, pride in the possibilities of their local place, and skills that transfer to post-secondary education and careers. Her senior year in high school, Kendra Austin, of Chattoroy, Washington, opened a business with two classmates, Meca Liquidations. They bought surplus office supplies from large companies and resold them to nonprofit organizations. Austin submitted her business plan to Johnson and Wales University in Providence, Rhode Island and won a scholarship.

Schools as institutions are also taking on an entrepreneurial stance towards their role in the community. The last business on Main Street in Rutland, South Dakota had long been closed when the students in the school decided to undertake a feasibility study to open a contemporary version of the old general store. After much study, school board was persuaded that building and operating such a business would not only be providing good educational opportunities for the students but also provide a real service to the community. The store now provides basic food products, videos, gasoline, a snack bar and, perhaps most importantly, a community gathering place for both youth and adults.

Examples of Expanding Place-based Learning

As place-based learning becomes more established, student work becomes more complex, more imbedded in the life of the local and less easily categorized within neat boundaries. The following stories are examples of such work.

Shelby Valley, Kentucky

Students, teachers, and community members in Shelby Valley, Kentucky have tapped into the civic engagement, cultural, and ecological components of place-based education through their community involvement. Student-facilitated public forums and student citizen action work are two avenues students from the Appalachian Rural Education Network use to demonstrate their leadership abilities. Students have facilitated two public forums engaging the public in identifying the needs of the communities in the Shelby Valley area of eastern Kentucky.

As a result of these forums, two committees were established: a Community Parks Committee and an Appalachian Heritage Outreach Committee. The Community Parks Committee has submitted plans to the Pike County School Board and the Pike County Fiscal Court for parks to be created at the G. F. Johnson Elementary School and Shelby Valley High School sites.

The Appalachian Heritage Outreach Committee (composed of teachers, student leaders, and community members) submitted a proposal to the Pike County Arts Council to support an Artists-in-Education Program within the consortia of schools in the Shelby Valley area.

Additionally, students from Shelby Valley High School and G. F. Johnson Elementary School are currently involved in student citizen action work building student engagement related to mountaintop removal in eastern Kentucky. Student project leaders and other citizens from Longfork of Shelby Creek organized a group of students and community members to attend a rally in Frankfort, Kentucky to protest mountaintop removal.

I really have respect for these young people who want to give of their time and energy to help improve our communities in the Shelby Valley area. It is good to know that there are young people who care about their communities. They are to be commended for their work. Estil Stewart, Mr. Stewart, a long-time resident and community leader from Long Fork of Shelby Creek, was the first to present his idea and a budget for the development of a community park on Long Fork. He and other community leaders on Long Fork and students with the Summer Work Program have already contributed many hours of labor toward this project. Due to their efforts, the site for the community park has already "taken on a new look" according to Mr. Stewart. Citizens have volunteered to keep the field mowed, have constructed picnic tables and park benches, and have kept the area free of litter.

Mendocino, California

Cultural and civic engagement components of place-based education come together in Mendocino, California. The North Coast Rural Challenge Network has helped the Chinese Temple Foundation restore and preserve the Temple of Kwan Tai in Mendocino, California. This original Taoist temple is about three blocks from the high school. Students walk by it daily; but few students had any idea what it was, why it was red and green, why it faced the ocean. Lack of funds and support made it impossible for the temple to be maintained. This national historic monument was going to collapse from neglect unless something was done.

Students began by researching the temple. They conducted interviews, analyzed primary documents, and created databases. A student written and produced video chronicled their research and the history of the temple. It has become a piece of preservation history, entered into the National Historic Preservation section in the Library of Congress. Students have used the film as evidence of community embedded curriculum. Some have become docents for the temple. Additionally, the Temple Foundation has used the video created by students as supplemental grant materials. A National Preservation Grant to restore the exterior of the temple was secured with the help of the student researchers. The student interest, study, and support of the temple has provided means for saving the historic monument.

Lubec, Maine

The economic and ecological components of place-based education are tightly woven in the aquiculture, hydroponics, and marine research work of students in Lubec, Maine. Student work in Lubec is helping to revitalize the economy as well as the school curriculum of this coastal community.

In the early 1990's, students initiated a tidal water quality program and clam study. This initial work has now evolved to an aquiculture program that has resulted in the re-energizing of the high school curriculum and the renovation of an abandoned waste treatment building into a state-of-the-art wet laboratory for fish farming and research.

Students are currently conducting aquiculture research on sea urchin diet and trout farming. They have created a video tape used by local fisherman documenting the challenges faced by the local marina and have recently built a greenhouse. Last year, young people were instrumental in retaining a lease from the Maine Marine Resources for a pen in the Cobbscook Bay. The community of Lubec, despite its history of social fragmentation and economic hardship, has rallied behind the student-initiated work. Last year, for the second consecutive year, the community allocated $15,000 for the Aquiculture Center.

The Power of Place-Based Education

Madeline Gibson works as a Circuit Rider with a network of schools and teachers in Appalachia engaged in place-based education. She travels between isolated schools and communities in her region and helps with the dissemination of information, idea sharing, professional development, and networking support for teachers involved with place-based education. She wrote the following about the power of learning and honoring one's place:

I have always heard the saying that "Knowledge is power." I must now adapt that statement to "Knowledge about place is powerful and empowering." Schools have always been full of knowledge. Facts, statistics, historical events, words, definitions, and abstract ideas have always filled the texts used by teachers and students. And yet, in my experience, most of this knowledge floated around for a while and then became used and discarded like the graded work of students thrown in wastebaskets. For most, this knowledge did not live and, at best, intimidated students by its bulk. Teachers, too, were overwhelmed by the task of motivating students to attack and master the knowledge.

But teaching by using place is different. Teachers and students work as a team to make decisions and to learn interesting facts about places and people they know. Learning becomes exciting and people (teachers, students, and community members) become eager again. This excitement and eagerness is evident in every school I visit where place has a part in the curriculum...

Teachers feel good about what they are doing. Students feel good about what they are doing. How often do we hear these statements? Most of the time, teaching is equated with struggle. Curriculum involving place does not eliminate these problems, but it does make learning more fun and more applicable to the student and teacher...

The most important reason for my love of the role I have played in the Network is straight from my heart: we add value. As an Appalachian child myself (many years ago), I never felt value in myself, my life, or my place at school. My family was very important to me and gave me my personal values. But my school took my language (my dialect) and forced me to change; my school had no books relating to my place; and the outside world was glorified to be so much better than where I lived. At school, I learned to be ashamed of my speech, my family's customs, and my heritage.
I do not blame my teachers. Many times they were educated elsewhere and had suffered because of their language, customs, and heritage. I think they were trying to help us adapt and not be hurt as they had been. But, in doing so, they taught me that I was not good enough as I was.

Our students in Network schools will not feel what I felt. Their language is valued. Their family customs are valued. They write papers, create videos, and do oral histories. They value their families. They research the history of the places in which they live, and they see the connections between yesterday and today. History is real and the knowledge they gather is alive.

And the power is within. The people (community, students, and teachers) gain knowledge and use the knowledge. They gain skills and develop talents and abilities. They feel pride. This great invisible current of energy fills the Network and makes its worth immeasurable. I am so appreciative of being able to be a part of it (Learning in Place, 2000, pp. 83-84).

What We Have Learned

Place-based education is neither "conservative" nor "liberal" in the traditional political sense of those terms. Place-based education is not romantic or nostalgic, trying to bring back the "good old days". The purposes are for every individual to find a way to live well in a sustainable way. Nature, the ecology, is the bottom line. In the words of Wes Jackson,"Nature is the measure."

Public education policy is based on a particular set of values, e.g. efficiency, effectiveness, competition, serving business/corporate interests. Redefining what is important to a society, what is valued, is difficult and long term at best.

The existing policy climate is not friendly to place-based learning. While creative teachers have found ways to meet state standards through place-based education, high stakes testing is seen as counter productive

Concrete examples of place-based learning are needed to focus conversations on alternative ways of thinking about the fundamental questions of "What is education for?" "Whose interests are served?" "Who gets to say?"

Extensive conversations are needed with school and community leaders prior to agreeing to work together on school reform which holds to a set of values that are different from those being promoted in the current school reform agenda.

The Rural Challenge reform strategy was/is designed to empower folks at the local level, teachers, students, administrators, community leaders, to create educational programs which would serve their communities. Schools and communities in poor minority communities appeared not to have the sense of efficacy needed to take advantage of this opportunity.

The most successful place-based sites are those where there is a growing consensus around an over arching issue or set of issues, e.g. protecting a river or watershed, preserving the local culture or a particular life style and where these issues are a major focus of student work.
Learning becomes more interesting and more powerful when students are engaged in issues that are connected with their lives, their communities, their environment.

Schools and communities must grow together. One cannot re-form schools without re-forming communities.

The best way to engage communities with their schools is to engage students in the community.

Summary/recommendations

The Rural Challenge, supported by a $50 million commitment from the Annenberg Foundation was a one time event. It is likely not likely to be repeated. So, how should we proceed to improve rural schools and communities. An over-riding lesson is that while some discretionary money is useful, it is not the most important thing. Too much money can get in the way of what needs to be done. What is most needed as we begin the new millennium is to re-examine our set of beliefs which form our existing "world view". Place-based education at its core is about common sense, how do we learn to live well where we are. David Orr (1994) says it best "...Education is no guarantee of decency, prudence, or wisdom. More of the same kind of education will only compound our problems. This is not an argument for ignorance but rather a statement that the work of education must now be measured against the standards of decency and human survival-the issues now looming so large before us in the twenty-first century. It is not education, but education of a certain kind, that will save us.

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PAPER PRESENTATIONS

Is There A 'New Rural Policy' In OECD Countries?

John M Bryden, Scotland

Abstract

This paper has benefited from work undertaken on OECD member country policies for the OECD in 1999, from work for the R[illegible] Affairs Committee at Scottish Office on a new rural strategy from 1997-99, from a review of the 1999 Irish White Paper on Rural Development, and from an assessment of the implementation of the EU rural policies for two conferences in Finland during March 2000. This work identified a notable transition in the nature, content, and administration of rural policies in many OECD countries during the 1980s and 1990s. These changes concerned issues of governance and institutional frameworks; issues of the definition of 'development'; and issues of policy goals and content. A key question, however, concerns the extent to which shifts in the language or rhetoric of rural policy are matched by reality. It is therefore important not to exaggerate the shifts which have taken place. It is also important to understand the reasons for the changes, and in this way whether to consider them as temporary or likely to persist. In this paper Bryden assesses the policy changes and their rationale in relation to rural trends at the beginning of the new Century and identifies some outstanding questions. He draws in part on recent experience in the EU countries, especially the experience of implementing Agenda 2000. He also reviews rural policy changes in selected OECD countries.

There seemed to be a notable transition in the nature, content, and administration of rural policies in many OECD countries during the 1980s and 1990s. The specific changes observed concern, in particular:

- a shift from sectoral to territorial policy involving attempts to integrate the various sectoral policies at regional and local levels, and define over-arching policy goals, particularly of 'sustainable rural development';
- the decentralisation of policy administration and, within limits, policy design to those levels;
- an increased use of partnerships between public, private and voluntary sectors in the development and implementation of local and regional policies;
- the introduction of mechanisms to ensure better co-ordination of different policies affecting rural areas and people at central government levels;
- the evolution of new, more flexible mechanisms for supporting regional and local policies;
- the encouragement of a 'bottom-up' approach to rural development;
- the evolution of means to transfer experience and learning from decentralised initiatives, with central levels playing a role in organising and encouraging exchanges and information networks;
- greater emphasis on diversification of rural economies with a particular stress on direct and indirect support for small and medium sized enterprises and local initiatives which build on existing resources and skills and stimulate networking between enterprises;
- a focus on local specificities which may provide new competitive advantages, such as amenities of an environmental or cultural nature;
- more attention to transport and communication infrastructure and to education and training as quasi public goods which can support enterprise indirectly; and
- more generally a shift from an approach based on subsidising declining sectors including agriculture, fishing and mining, to one based on strategic investments to develop new activities.

The changes thus concern issues of governance and institutional frameworks; issues of the definition of 'development'; and issues of policy goals and content. A key question, however, concerns the extent to which shifts in the language or rhetoric of rural policy are matched by the reality. It is therefore important not to exaggerate the shifts which have taken place. It is also important to understand the reasons for the changes, and in this way whether to consider them as temporary or likely to persist.

In many countries, sectoral policies and centralised sectoral administration of them remain very important, and many of these retain the character of subsidies to maintain existing activity rather than investment to adapt to, and take advantage of, new conditions. In some cases, policies in some countries appear to have reverted to a more sectoral character in the later 1990s. Moreover, although apparently increased concern about rural society may give the impression that resources for 'rural development' have been increasing, it is not clear that this is the case when looked at in 'real' terms. However, the above summary represents a common understanding of the general trends, and there are some reasons for believing that they are likely to persist.

In this paper I assess the policy changes and their rationale in relation to rural trends at the beginning of the new Century and try to identify some outstanding questions. I will draw in part on recent experience in the EU countries, especially the experience of implementing Agenda 2000. However, I will also review rural policy changes in selected OECD countries.

Rationale for an integrated territorial approach to rural policy

The rationale for a territorial approach to rural policy is expressed in various ways of which the following are most common:

- the interests of the majority of rural citizens, and even most farm families, are no longer (if they ever were) best served by sectoral policies, since they increasingly depend on employment and income generated by a complex mix of interacting economic activities, themselves often based on actual or perceived quality of life considerations linked to environment, culture and life styles;
- rural areas face a period of intensified social and economic change as a result of globalisation and related restrictions on public sector spending, and need help to adjust to new conditions;
- rural areas are diverse in their history, culture, natural conditions, peripherality, sparsity of population, settlement patterns, economic structure, human and other resources, environment, and other characteristics which enable them to cope with change and develop new bases for economic and social life;
- part of this diversity concerns the position of indigenous peoples and minority groups, such as the native peoples of N America and N Europe, and the Gaels of Scotland and Ireland, whose rights have been increasingly recognised, and for whom special policies are developed; many but not all rural areas still suffer from relatively low incomes, high unemployment and underemployment, poor quality of employment, outward migration of young people, and low quality services which raises issues of equity and social cohesion;
- rural areas can often contribute to the quality of life of society as a whole because they contain important public or quasi public goods such as a clean environment, attractive landscapes and cultural heritage; relatively socially integrated and 'safe' communities, and it is difficult or impossible to capture the relevant values through the market[1];
- rural areas produce basic food ingredients and many other raw materials essential for life;
- the development of rural areas is an essential part of efforts to promote economic and social cohesion within and between countries (for example within the EU).
- agriculture will be increasingly confronted with new challenges not only to become more competitive, but also to meet demands relating to health, quality, environmental credentials and animal welfare as well as other consumer requirements;
- farm families must be able to rely on a 'living countryside' where they can access the services, infrastructure, and supplementary employment they need;
- the acceptance of an over-riding policy goal of sustainable (rural) development in economic, social and environmental terms means that people are the objects rather than the subjects of development which in turn means both that they should be actively involved, that the scope of development should be holistic, and that the scale should be 'local' both to enable human engagement and to reflect diversity of people's goals and circumstances.

In some cases at least, these arguments are about market failures - the best known examples being those concerning public and quasi-public goods, of which the natural and cultural heritage are most usually cited. But they may also be couched in terms of imperfect knowledge or information, restrictions on access to natural and other resources and other 'market imperfections', as well as in terms of social goals of equity, political goals of cohesion, or holistic goals of sustainability.

The territorial approach leads to a further issue: at what level of governance should rural development policy be addressed? Within the EU this resolves itself into the question of whether or in what respects rural policy is an EU matter, a national matter, a regional or local matter. Similar questions can however be raised within federal and unitary States. For example, the issue has been crucial in the constitutional debates in Canada, including those concerning the First Nations Agreements.

I now want to look at the EU case in some detail, particularly addressing the issue of the development of rural as opposed to agricultural policy, and the extent to which the policy rhetoric is matched by reality in rural policy delivery.

The development of EU rural policy, rhetoric and reality

Taking the case of the EU, the shift to a more territorial, integrated and devolved approach started in earnest after the 'southern enlargement', the mini-CAP reforms and the Single European Act of the mid-1980's. These, together with the growing problems associated with the Uruguay Round of multi-national trade talks, led first to a major reform of the EU Structural Funds and Structural and Cohesion policies in 1987, and a radical reform of the CAP in 1992. In 1988, an EC non-paper, The Future of Rural Areas, outlined a new vision and approach to rural development which presented a territorial approach to rural policy. In 1991, the EU launched the LEADER programme designed to support local rural partnerships with 'bottom up', integrated rural development programmes in the priority Objective 1 and 5b regions defined in the reform of Structural and Cohesion Policies. One of the key principles of the operation of the structural funds in priority regions was concerned the role of regional partnerships in putting together regional programmes and in their implementation. Unlike CAP market policy, wholly financed by EAGGF Guarantee Section, the Regional Programmes and LEADER were co-financed by the Member States. This recognised that structural and cohesion policy was and had to be a joint venture between the European Commission and the regions and nations of the EU, in effect a 'shared competence'. EU supported regional programmes, and LEADER, were also conceived as 'integrated development' efforts to the extent that they were funded by the three main EU Structural Funds covering regional development (the ERDF), human resources (ESF), and agricultural structures and related developments (EAGGF-Guidance).

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[1] Because relevant markets do not exist and are difficult or impossible to create and because the 'utilities' involved cannot only be considered and measured in economic terms.

The CAP reform of 1992 introduced further measures of a structural character which were also to be co-financed by the Member States, namely the Accompanying Measures - Agri-Environment, Farmer retirement, and Agri-Forestry. These measures were, however, to be financed by the Guarantee Section of EAGGF traditionally reserved for market policy.

Whilst the driving forces behind reform of structural and cohesion policies were mainly internal[2], those leading to CAP reforms were both internal and external. External pressures particularly referred to the link between subsidies, increasing production, surpluses and subsidised exports competing with food exports from traditional exporters, especially the USA, Canada, Australia, New Zealand and S America. EU agreement to reduce such subsidies was central to a successful conclusion to the Uruguay Round. In the event, the agreement which was reached in 1994 (the 'URA') accepted the CAP reforms, with de-coupled compensatory payments to farmers being placed in what is called a 'blue box' currently excluded from the subsidy reduction measures, but with some questions about their future exclusion. The Accompanying Measures and other EAGGF structural and rural development measures were in the so called 'green box' of subsidies, considered to be unrelated to production, and hence also excluded from agreements on subsidy reduction.

The URA set the timing for the next round of trade talks to start at the end of 1999, and committed participants to further reduction in levels of protection and related subsidies, especially concerning subsidies directly linked with production which in the EU case are a large part of the CAP market policy. The presumption was that further cuts in support prices for agriculture would ensue. The further CAP reforms in Agenda 2000 therefore moved further in this direction, thus partially pre-empting the Trade negotiations. However, an additional factor behind these reforms was the prospect of 'eastern enlargement' of the EU to include perhaps ten Central and Eastern European Countries early in the new Century. Here the concern of the existing, and significantly richer, member States was that the burden of financing the existing CAP when applied to the new member States would be unsupportable, and fall mainly on them. These two critical factors led to the elevation of 'rural development' to become what the Commission calls the 'second pillar of the CAP', and to a significantly higher profile for rural development policy. The rationale is, first that 'rural development' measures are in the 'green box' of subsidies, and therefore most defensible in the Trade Talks, and second that they are co-financed by member states, and hence least likely to be implemented in a major way by poorer countries, especially the CEECs. Within the CAP, the proportion of expenditure which is co-financed by member States has in fact been increasing since the 1980's. In other types of development expenditure, and especially the ERDF and ESF, co-financing with national and regional partners is the norm. Since the proportion of the community budget taken by the ERDF and ESF has also been increasing since the 1980's, we can easily see that the overall proportion of the EC budget which is devoted to measures wholly financed by the Commission has been falling. And we can see that this is a trend likely to continue. Within this scenario, we can equally see how 'rural development' is likely to take an increasing share of CAP expenditure in future, since it delivers to both internal and external pressures on the EU policies and finance.

What, then, is this 'second pillar', EU rural development policy? It is mainly linked to the new Rural Development Regulation, an outcome of Agenda 2000. It also referes however to the Objectives I and II of the Structural and Cohesion policy since Agenda 2000 and the LEADER+ programme which succeeds LEADER I and II.

The Rural Development Regulation

The Commissioner for Agriculture, Franz Fischler, has attached much importance to rural development: he initiated the Rural Development Conference in Cork in Ireland in November 1996, which was intended to create greater priority for this purpose, but which in fact provoked adverse reactions both from farm organisations, which saw this as an attack on traditional agricultural policy, and from Mrs Wulf-Mathies, the then Commissioner for Regional and Cohesion Policy, who on the contrary objected to further special treatment for rural areas and to the effects of the proposals on the Cohesion objectives and related principles of concentration.

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[2] these particularly concerned the combined effects of the single European market and free flows of goods, services, capital and labour within it and the southern enlargement to include the relatively poor and agrarian countries of Greece, Spain and Portugal

"Agenda 2000" suggested a compromise. It included a section which stressed the need for continued "rural policy instruments" in view of the further inevitable changes in the market situation, in market policy and in trade rules (i.e. WTO). Moreover, *"rural areas have increasingly important environmental and recreational functions to fulfil...Conversely, the increasing importance of environmental and recreational needs will also offer new development opportunities from which farmers and their families should be allowed to benefit"*. Agenda 2000 foresaw rural development' measures *"to accompany and complement market policies"* and which would embrace *"all types of measures supporting structural adjustment and rural development as presently co-financed by the EAGGF "Guidance" Section"*.

Although the new "Rural Fund" called for at Cork [CEC,1996] was conspicuously absent from Agenda 2000, the proposals for a new Rural Development Regulation were adopted at the Berlin Summit in 1999. The measures in this Regulation are to be funded by FEOGA Guarantee Section , traditionally the financial envelope for market policies, rather than the Guidance Section which was designed to finance measures of a structural nature. The only exception to this is Objective 1 regions, in which the RDR (other than the old accompanying measures and the less favoured areas measures) will be funded by the Guidance Section.

The RDR will apply to all areas of the EU, and consists almost entirely of a re-packaging of measures which were either funded under agricultural structures policy (Objective 5a), or agricultural measures in regional policies (Objective 5b) and the old Accompanying Measures introduced in the 1992 CAP Reforms (Agro-Environment, Farm Forestry, Farmer Retirement) i.e. including present Objective 5a measures). It is presented as a 'menu' of measures, of which only agro-environment is compulsory. Therefore, the following are the main elements:-

1. Investment in agricultural holdings (Ch I)
2. Setting up of Young Farmers (Ch II)
3. Training (Ch III)
4. Early retirement (Ch IV)
5. Less-favoured Areas and Areas with Environmental Restrictions (Ch V)
6. Agri-Environment (Ch VI)
7. Improving Marketing and Processing of Agricultural Products (Ch VII)
8. Forestry (Ch VIII)
9. Promotion the Adaptation and Development of Rural Areas (Ch IX)

This last concerns the Article 33 Measures, amongst which are the measures which can address the problems and clients beyond agriculture (marked in bold type). The menu is:-

- land improvement
- reparcelling
- setting up farm relief and farm management services
- marketing of quality agricultural products
- basic services for the rural economy and population
- village renewal and development and conservation of the rural heritage
- diversification of agricultural activities and activities close to agriculture to provide multiple activities or alternative incomes
- agricultural water resources management
- infrastructure linked to agriculture
- tourism and craft investment
- protection of environment in connection with land, forestry and landscape conservation and with the improvement of animal welfare
- restoration of agricultural production damaged by natural disasters and improvement of protection instruments
- financial engineering.

In Objective 1 regions the RDR measures funded by Guidance Section will be part of the Regional Programmes under the Structural Funds Regulations. In Objective 2 regions, all RDR measures other than the old accompanying measures and LFAs may also form part of the Regional Programmes. Elsewhere, rural development plans will be drawn up 'at the geographical level deemed most appropriate' and as far as possible be integrated into a single plan lasting 7 years

Rural development, however, can hardly be defined just as an accompaniment to market policy[3]. The real motive in switching the financing of such measures appears to be budgetary[4].

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[3] The tendency of the Commission and the Council to refer to rural development 'as an accompaniment to agricultural market policy is worrying in the sense that it omits the many other justifications and rationales for a rural development policy. This may however be tactically necessary in view of the 'rules' concerning uses of the Agricultural Fund (must be directly or indirectly linked to farming/the Treaty objectives]. Another worrying tendency is to treat agri-environmental policy as if it were the same thing as rural development policy! This is, for example, evident from the press release following the Council meeting ion 17,18,19 November 1997. Both are also linked

The RDR has EUR 4.3 billion annually, compared with an average of 38 billion for market policy.

At present there is confusion in the Commission about the distinction between rural and regional development: the new horizontal rural development measure is not according to the Commission to be seen as regional policy. On the one hand this prompts fears that the client group for 'rural development' measures will remain confined to farmers, or the other it raises alarm bells about yet more separate and distinct programmes of a spatial nature which are not integrated with regional spatial policies or planning policies.

Structural Policy: Objectives and Funds

Post Agenda 2000, the number of "Objectives" has been reduced from seven to three. The existing Funds are maintained. The population covered by the spatially designated funds has been reduced from 51% to 43% of the EU total. ***The new "Objective I"*** [5] is essentially the same as at present with the addition of the former Objective 6. The Regional Fund, Social Fund and FEOGA "Guidance" would continue to support integrated programmes, as now. ***The new "Objective II"*** includes both urban areas in difficulty and declining rural areas: it thus replaces the current Objectives 2 and 5b[6]. Objective 1, 5b and 2 areas no longer meeting the criteria have transitional programmes. The population covered by rural Objective II areas is significantly less than in the previous Objective 5b areas. ***The new "Objective III" is*** "horizontal" for regions not covered by Objectives I or II, and aims at the *"development of human resources"*. Although in principle Objective III could have been combined with any FEOGA funded Rural Development Measure outside Objective I and II regions, in practice it will not be.

Objective II Rural Programmes should favour economic diversification, with increased support for small and medium-sized enterprises and innovation, and with greater emphasis on vocational training, local development potential, protection of the environment, etc. *"The development of rural areas should build better links between the countryside and local towns: this should facilitate the diversification of industrial, craft, cultural and service activities"*.

LEADER+ , which remains based on general LEADER principles of innovation, bottom up partnership and integration, will have just over EUR 2 billion, compared with 1.7 billion ECUs in the last planning period 1994-99. However, all rural areas in the EU are now eligible, and so the available funds will be spread more thinly on the ground unless the member States and the EU succeed in the latter's goal of reducing the number of LEADER groups.

The Implementation of the RDR

In practice, it is clear that most of the EU funding for the RDR will be absorbed by existing measures, in particular the accompanying measures which now include the LFA measures. In most countries, the enthusiasm for Article 33 measures going beyond the farming clients is limited, because of opposition from farmers lobbies, budget constraints, and the role of Ministries of Agriculture. An analysis of the draft programmes of France, Denmark, Finland and Scotland shows the importance of national level programmes for the main spending elements, especially the Accompanying Measures (which are not new) and Farm Investment. The measures which relate to the wider rural economy, few though they are, are all within Article 33, but these are receiving a very low priority, with less than 10% of the overall budget in all cases examined. If this turns out to be the general case, then it means that less than 1% of CAP spending will be devoted to non-agricultural aspects of rural development within the RDR – hardly a 'second pillar'!. Whilst the idea of a menu of measures has clearly allowed some countries to decide which measures to implement and where to spend the resources, this has happened very largely at national rather than regional level, and the priorities remain firmly fixed on the farming sector.

The Commission's Agenda 2000 proposals for rural development were already a retreat from those of the Cork Declaration. On the one hand this made it appear that it had largely 'ditched' rural policy for the time being, under pressure from the agricultural lobbies on the one side and

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to the EU stance on the 'European Model of Agriculture' in the Millennium Round.

[4] The changes have the effect of shifting some expenditure from the "Structures" heading in the "financial perspectives" to the CAP heading, where it is expected that there will be some leeway within the "guideline". Fischler may see this as a way to avoid cuts in the guideline and thus of holding on to a larger CAP budget. However, several member States (e.g. UK) are looking for savings in the CAP budget in the medium term, and it cannot be assumed that any eventual savings in market support and direct income payments will be automatically transferred into accompanying measures.

[5] Objective 1 is for those regions with less than 75% of the average EU GDP per capita. Objective 6 was for the sparely populated arctic regions of Sweden and Finland. Objective I thus contains many rural regions and areas, although not confined to these.

[6] Objective 5b was for rural areas in decline; Objective 2 was for declining industrial regions.

internal disagreements between DG6 and DG16. On the other hand, it placed rural development firmly in the agricultural sector policy as part of the strategy on multifunctional agriculture for the forthcoming World Trade talks and also for limiting the impacts of enlargement on the CAP budget.

The end result seems to be a set of provisions for rural regions which seem quite inadequate in relation to the challenge of EU enlargement. Spatial policy, implemented through the Structural Funds and aimed at the critical objective of social and economic cohesion, remains inadequate to deal with existing let alone post-enlargement and post-EMU regional inequalities. Agricultural policy remains largely unreconstructed, and unlikely to satisfy the needs of the Millennium Round of Trade talks. Although the Commission has argued that 'Rural development is not just an annexe to the CAP, but must be a strong, effective and coherent instrument accompanying and supplementing agricultural market policy' it is clear that there will, for the most part, be no integrated rural development policy other than LEADER +, and that those elements of what it calls its rural policy which actually go beyond the agricultural sector will indeed be marginal as compared with spending on the agricultural sector itself whether through Markets Policy or through the RDR. In my view, the most 'integrated' policy for regions which are both poor and mainly rural will be in the Objective 1 regions, largely in southern Europe; for the rest, at least at EC level, a truly integrated rural policy seems some way off. I have presented the EU situation in some detail because I believe that it illustrates the tendency for policy rhetoric to be somewhat ahead of the reality. Nevertheless, it is also possible to point to new National rural development policies both within and beyond the EU and identify some interesting changes.

Trends in rural policy in OECD countries

Drawing on the work of the OECD during the 1990's, and analysis of new rural policies in a number of member countries, we can identify changes in the content and institutional structures of such policies.

Policy content

Rural policies of a territorial nature now frequently comprise some or all of the following elements:

- efforts to reinforce rural economies, principally through diversification of economic activities, mainly using indirect aid for transport and communications infrastructure, promoting networks of knowledge and expertise, supporting education and training, and increasing the attractiveness of areas for new enterprises;
- attempts to restructure agriculture through intensification, modernisation and increasing value added in productive regions, extensification and development of multifunctional agriculture in less productive regions, and internal diversification and quality products in areas of 'traditional' agriculture;
- strengthening transport and communications infrastructure including telecommunications infrastructure;
- enhancing business assistance especially efforts to diffuse new technologies through R&D and the development of specialised regional institutes or centres, enhancing business services, establishing inter-regional and international business networks and encouraging endogenous innovative initiatives;
- developing human resources through vocational training, improving entrepreneurial skills, and school-to-work initiatives;
- 'capacity building' at local levels;
- developing and commercialising natural and cultural 'amenities' through direct exploitation of the relevant resources for recreation, tourism etc., and indirectly through creation of conditions likely to favour economic development;
- creation of local products based on local identity and aiming at a market niche, usually linked to local natural and cultural 'capital', and including development of quality labels and guarantees linking products to places, particular production techniques, etc.;
- new or adapted financial instruments, which may include fiscal equalisation schemes which seek to transfer budgetary resources from richer to poorer states and regions, subsidies and transfer payments to particular social or occupational groups or industries (farmers, fishermen, the unemployed, the sick, the poor, the elderly, etc.), indirect subsidies for 'universal services' provided throughout nation states at more or less uniform tariffs and/or levels (post offices, public transport, telecommunications, health, education, water supply etc.) and various forms of development assistance both for public investment in infrastructure and various public and quasi-public goods, and for private investments and community initiatives. The latter can include grants, loans, equity investment, interest-rate subsidies, tax relief, guarantees, usually on a selective basis;
- new ways of providing public services in rural areas, sometimes combined in service centres[7] and, as in the case of telemedicine and distance learning sometimes using information and communications technologies;

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[7] The Australian Federal Government is spending up to $70 million over 5 years to establish 'transaction centres' in small rural towns providing general services and basic business services.

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- the increasing use of programme evaluation procedures both as a control and a learning mechanism.

In terms of policy content, Freshwater points out that rural areas have a higher proportion of subsidy type policies than investment type policies than is the case in urban regions[8]. This distinction, also made by Saraceno[9] in the European context, becomes critical in the new context of globalisation and efforts to promote more sustainable rural development and more effective rural policies.

The institutional framework

A wide variety of institutional arrangements for the delivery of rural policy has been noted in OECD countries, but some common features are:-

- decentralisation towards regions and localities, sometimes involving efforts at community 'empowerment', in order to better meet diverse needs and conditions found in rural areas and tap local knowledge and other resources;
- support for 'bottom-up' development initiatives, for example through the Canadian Community Futures Programme and the EU LEADER programme;
- attempts at better co-ordination of policies affecting rural areas at central levels through inter-departmental and inter-ministerial working groups or committees, sometimes paralleled by rural affairs committees in national parliaments, and possibly involving various forms of 'policy-proofing' to ensure that all policies consider the rural dimension;
- greater co-ordination and co-operation at regional and local levels usually through partnerships involving the different public departments and agencies as well as private and voluntary sector interests.

In the USA there is a long history of federal assistance programs for rural areas, and attempts to secure better integration and co-ordination between them. Recently, as a result of a General Accounting Office report, efforts have been made to provide a strategic vision for such programs, to make them more accessible and adaptable to local needs and priorities, and to bring responsibility and authority for such programs closer together. This last has focused on federal-state partnerships in the form of the state rural development councils which include federal and state officials, local government officials, tribal representatives, financial and business leaders and a range of other partners unique to each states.

Although both Deavers (OECD, 1996) and Freshwater have argued that these policy shifts are not irreversible[10] [11], and the outcome of the EU Agenda 2000 is discouraging, there are signs that the policy trends noted are in some cases being strengthened yet again. There is an expanded Community Futures Programme under the Regional Development Agencies in **Canada**, as well as a new Pilot Projects Initiative working at community level to explore innovative approaches to rural community development. In the **USA**, the proposed Performance Partnership suggested an integrated rural initiative consolidating funds for 14 major programs, and allowing re-allocation of funds among programs at State level to better meet their priorities. In the **EU**, the idea of a 'menu' of policies under the new Rural Development Regulation in principle allows member States and regions to pick and choose measures appropriate to their circumstances and allocate funds accordingly. There is also evidence of a 'mainstreaming' of the LEADER programme through the adoption of similar national programmes for 'bottom up' rural development in Spain, Finland, Ireland and Scotland for example. In **Canada**, a Rural Dialogue was undertaken in 1998 in recognition of the need for a 'bottom up' approach. This had responses from nearly 7,000 rural Canadians about their concerns and how they wanted the federal government to respond. From that has come a policy document *The Federal Framework for Action in Rural Canada* which deals not only with the major action areas highlighted by rural people, but also sets out guiding principles about how the government works with rural people. Under the Canadian Rural Partnership (CRP) there is a Cabinet agreement to subject new policies and programmes to 'policy proofing' through a rural lens. There is also agreement to provide an annual report to Parliament on the progress of the CRP. In **Ireland** a greater role is being given to the local authorities, and County Development Boards which will be partnerships. There will also be support for local area-based initiatives which promote community empowerment, participation in decision-making and control over resources. A 'lead department' has been designated and renamed as the Department of Agriculture, Food and Rural Development (DAFARD). In addition, a Cabinet Sub-Committee is being formed under the Chairmanship of An Taoiseach and comprising Ministers having a significant remit in relation to policy responsibilities impinging on rural development, and with the aim of policy co-ordination at the highest level. This will be supported by an Inter-departmental Policy Committee chaired by DAFARD and comprising senior officials of relevant Departments. A National Rural Development Forum (NRDF) comprising representatives of Government Departments, State agencies, Regional Assemblies, Regional Authorities, Local Authorities, social partners, local development bodies and the wider voluntary and community sector (IWP, 23-24). In addition, administrative procedures for the 'rural proofing' of policies are to be introduced in all Departments. The new devolved Government in **Scotland** has introduced a Rural Affairs Committee in the Parliament, which contrasts with the Agriculture Committee in the Westminster Parliament. At **UK** level, there is a new Performance and Innovation Unit in the Cabinet Office which has a project on rural economies, and a new Rural White Paper is under preparation. A group of rural Labour MP's have recently conducted a Rural Audit, covering all aspects of rural life, and stressing the need for an integrated, local and regional approach to rural policy. In addition, the working through of the practical implications of an overarching goal of sustainable urban and rural development has led to potentially closer collaboration between rural and environmental interests at practical and political levels.

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[8] Freshwater, D 'Farm production Policy versus Rural Life Policy. Staff Paper 371. Department of Agricultural Economics, University of Kentucky, College of Agriculture, Lexington 40546. June 1997.

[9] Saraceno, E 'Recent Trends in Rural development and their Conceptualisation'. Journal of Rural Studies, Vol.10, No.4. pp 321-330 , 1994.

[10] Deavers argues that agricultural lobbies continue to seek to have rural development policy incorporated in agricultural policy, rather than having agricultural policy subsumed within an integrated territorial policy.

[11] Freshwater argues that whereas farmers interests retained strong political power through unity and cohesion in rent-seeking behaviour, rural interests outside agriculture remained diverse and fragmented. Moreover, the policies affecting those other interests are, more often than not, dominated by urban interests (for example, monetary and fiscal policy, health, education and social welfare policies, environmental and infrastructure policies) in the formation of which rural interests usually have little say.

Targeting of priority areas for central action and funding can also be observed in some cases. In the **USA**, a demonstration program of empowerment zones and enterprise communities was launched in the mid 1990's for some of the poorest rural communities which needed leadership and institutional 'capacity building'. Community capacity building and leadership are also a major priority in Canada.

An important trend has been the apparently growing power of the supra-national level on the one hand, and the regional level on the other, as compared with the national level. This is not just a matter of changes in the distribution of administrative functions between levels, but also political and institutional changes, such as the extension of EU powers, the creation of a Committee of Regions at EU level, Scottish devolution, and the creation of regional governance structures where none existed before in several OECD countries. Moreover, there are new institutional structures of local development emerging in some countries which cut across traditional administrative, geographical, and sectoral boundaries, examples being the Regional Nature Parks in France, LEADER local action groups, and Local Agenda 21 activities.

Review of policy frameworks and content

Rural development is thus not only a territorial and non-sectoral concept, but rural policies are increasingly organised at territorial levels and cover a number of sectors, and the relationships between them, rather than a single sector. They need to deal with diversity of social objectives and rural conditions, and be both locally rooted and participatory ('bottom-up' principles, linked to appropriate 'top down' structures of support and governance). This inevitably leads to the conclusion that rural development policies can be governed by rules and regulations within specific administrative boundaries, whether local, regional, or national, although these are inevitably influenced to a greater or lesser degree by supra-national policies such as those of the EU.

It has already been argued that development policy and practice must allow for diversity in the goals and objectives of development, must acknowledge that it should include social, cultural, environmental as well as economic dimensions, and should allow for democratic processes at all levels. The idea of local and regional partnerships is often a step forward, and the idea of including social and environmental groups (NGOs) in such partnerships within the EU is another sign of progress, but more needs to be said in future about democratic processes and participation of rural people. In some cases, partnerships have lacked open and transparent procedures and accountability to local populations. In other cases partnerships have proliferated along sectoral lines, leading to multiple partnerships in any one locality or region which frustrate or hamper the goals of 'integration', and, often, lead to 'partnership fatigue'. Some relevant questions for policy development are:-

- how can partnerships be made more open, accountable and democratic?
- how can the participation of citizens in public decision-making be improved, especially in very sparsely populated areas with scattered settlement patterns?
- should partnerships be re-organised on a territorial basis to serve the needs of planning for integrated rural development at local and regional levels and avoid proliferation of sectoral partnerships?
- should partnerships be mainly means of joint strategic planning, monitoring and assessment or should they be decision-making or implementing bodies as well?

It may be that there should be a strong(er) role for democratically elected local authorities in local and regional partnerships, and that a single local or regional partnership should deal with all social, economic and environmental aspects of territorial strategic planning for development. It may also be that in some sparsely populated areas, levels of local government are too remote to permit easy access to services and decision-making processes by rural citizens. Central government financial support, negotiated on the basis of the territorial plan, could take the form of a global grant and rather than being subject to complex *ex ante* administrative rules and conditions, financial control could be in terms of *ex post* outputs and outcomes or results.

At the level of Central government, there often remains room for improvement in co-ordination of the various ministries and departments responsible for policies affecting rural development. Judging by recent developments some key elements seem to be:

- Policy 'proofing' by a senior inter-departmental or inter-ministerial group. This group sees policies affecting rural areas during their formative stages, is able to point out possible problems for rural areas and can propose amendments. For example, the group may look at policies for housing, transport, telecommunications, water and waste disposal, postal services, education and training, health, regional development, agriculture and environment, national parks, local government, and so on.
- This process is likely to be stimulated by the presence of a Rural Affairs Committee in the Parliament, with a territorial rather than a sectoral remit, since this will ensure senior civil servant participation in any inter-departmental or inter-ministerial group.
- Allocation of rural co-ordination responsibilities to one senior Ministry or department which must chair the inter-departmental or inter-ministerial group.

This partly refers to the continuing role for central Government in terms of macro-economic management, which will have rural implications, but it goes beyond that.

Another role for the State is in ensuring that there is a good flow of information about rural development activities and their results. In many cases this is undertaken through national or supra-national networks of local partnerships (as for example in the European LEADER Observatory) which exchange information, run training seminars, and provide documentation on 'good practice' etc. Such activities need to be supported by active research which can codify and validate results, and raise issues to be addressed.

The over-arching goals of rural policy need to be clearly expressed in terms of sustainable development, which is interpreted as encompassing economic, social, cultural and environmental dimensions. Policies and their impacts should then be assessed in these terms. A key policy issue is how to get greater positive inter-relationships ('synergy') between sectoral policies in the economic, social and environmental spheres. For example, how to ensure that training policies and activities link with policies for enterprise development, how enterprise development fits with infrastructure and environmental policies, how agro-environment policies fit with tourism, etc. Given the highly sectoral nature of policies and their implementation, this remains a huge challenge in most countries. On a more optimistic note, the rhetoric on rural policy issues has been improving and, here and there one can see signs of improvements in processes and methods of planning, monitoring and evaluation to incorporate more holistic or 'joined up' thinking.

Conclusions

What is rural development?

I have argued that rural development is increasingly viewed as a territorial concept involving increases in the welfare of rural citizens, including incomes, and quality of life. It is thus also an 'holistic' concept covering economic, social and environmental dimensions - often nowadays subsumed in the concept of 'sustainable rural development'. This represents a marked shift from concepts which focused mainly or wholly on economic growth, and on sectoral approaches such as those dealing with agriculture or industrial location. It has led to greater recognition of diversity in rural circumstances, needs, opportunities, and constraints; to greater emphasis on policy 'integration' and 'co-ordination'; and to a revision of the division of powers and responsibilities between central, regional and local levels.

What are the challenges for rural policy?

In these circumstances, there are several challenges for rural policy, namely:

- to articulate visions, over-arching goals and strategies for rural areas at both territorial and central levels;
- to define a rationale for policy intervention and hence priorities;
- to ensure that there is an appropriate and efficient division of powers and responsibilities over policy design and implementation which matches the diversity and complexity of rural areas, problems, needs etc;
- to ensure a 'joined up' or co-ordinated approach to rural policy at central levels, and an integrated approach to policy design and implementation at local levels;
- to ensure that local leadership and institutional capacities match new responsibilities and powers being devolved to local levels;
- to ensure the participation of citizens in territorial policy making;
- to ensure the appropriate balance between 'subsidies' and 'investment'.

How are OECD countries responding to these challenges?

Rural policy has seen significant developments in the past two decades, and several member countries have reviewed their rural policies in recent years. Key elements have been:-

- efforts to build a new vision for rural areas around sustainable rural development involving diversified and more rewarding opportunities for enterprise and employment, ensuring a better quality of life for rural citizens, and a high quality of the natural and human environment;
- efforts to improve central co-ordination of a wide range of policies affecting rural citizens through institutional arrangements for inter-departmental and inter-ministerial co-ordination, including 'policy proofing' to ensure that all such policies contribute to the over-arching goals, and that actual or potential conflicts are minimised;
- attempts to create more flexible arrangements for central support of rural development such that the diverse and varying needs and circumstances of rural areas can be better met, for example through policy 'menus', devolved powers to prioritise measures and spending, and 'global' programme grants.
- attempts to redefine the rationale for policy intervention in a context of globalisation, world trade agreements, and fiscal constraints;
- efforts to create new institutional arrangements at local and regional levels to define policy objectives priorities and strategies, and implement policies and programs at these levels, as well as to involve both government and non-government actors in ways which not only integrate and co-ordinate activities, but also draw on local and regional knowledge and other resources and increase the participation of local people;
- efforts to build local capacities to act through leadership and community development programs and empowerment of local actors - i.e. a better matching of responsibilities and powers - often through rural innovation and pilot programs focusing on fragile rural areas;
- a new focus on trying to improve the 'competitiveness' of rural areas, and hence to understand the key elements which differentiate rural areas which appear to be 'performing' well from those which are not;
- attempts to divert resources from programs which focused on subsidies to existing rural activities in an effort to maintain these, to programs which focus on support for investment in human and social capital, diversification of economic activity and the related creation of new enterprises, key infrastructure, the environment, and innovation.

Nevertheless, the EU experience should caution us that rhetoric and good intentions are not always matched by reality.

What key questions remain which require new knowledge to support policy development at different levels?

The diversity of approaches taken in different countries, and the recency of many such changes, suggests that rural policy is in a period of transition in which there are many experiments being conducted. In so far a much rural data collection and research follows rather than precedes such changes, we can recognise a need for new research and data gathering which can serve the new policy agenda. This includes efforts to learn about *processes* like partnership-building, community involvement, empowerment, capacity-building, social entrepreneurship, networking, innovation, new enterprise formation, social exclusion and inclusion, and the practical application of concepts such as sustainable rural development, integrated development and policy-proofing. It also covers issues of governance, including the issues surrounding re-defining the role of the different levels of administration and the relationships between them, the relationship between partnerships and democratically elected representatives.

Given that rural areas exhibit radical differences in 'performance' as measured by indicators such as employment creation, enterprise formation and cessation, unemployment and underemployment, and quality of life, even in similar geographies, it is clear that better understanding of the reasons for these differences has become essential for the improvement of policy efforts at local and regional levels. Although tendencies such as 'globalisation' and the 'information and communications technology revolution' are sometimes presented as inexorable forces acting on people and places, it is evident that human agency, both individual and collective, plays the key role in determining economic and social responses and outcomes. It surely follows that we need more knowledge concerning individual and collective 'responses' of local actors, including individual and social entrepreneurs.

For a number of reasons, there appear to be increasing constraints on the ability of public budgets to provide comparable public services such as health and education in the predominantly rural regions using traditional methods. It is clearly vital that high quality public services are provided in such areas if populations are to be maintained or increased. New methods, such as the 'transactions centres' in smaller rural towns in Australia, and telemedicine and new forms of distance education and training in a number of countries, are being tried, and need to be assessed to assure rural people and rural providers that they offer comparable quality to that found elsewhere. The effort to 'integrate' sectoral policies at local levels is closely linked with holistic ideas of 'sustainable development' which include notions that synergy can exist between economic, social and environmental goals and activities. The usual examples cover the links between the quality of the natural and cultural heritage and the commercialisation of tourism, but they go wider than this.

It is important to document good cases where such synergy can be achieved and develop guidelines to good practice.

The devolution of rural policy to regional and local levels, and the plethora of local partnerships and community level initiatives is essential if policies are to meet diverse needs and circumstances, but presents the danger that 'the wheel will be re-invented'. The collation, validation and dissemination of information on initiatives and projects which result must therefore be a key role to be stimulated by the State, and one which can be increasingly facilitated by creative use of information and communications technologies.

I conclude that something exists which can be described as a 'new rural policy'. This addresses a broader range of development issues and sectors at local and regional levels in a more integrated way. It involves new forms of governance, marked by devolution, partnership and participation and new mechanisms of co-ordination at central levels. Although this new rural policy still has an experimental character, and lacks a good deal of supporting data, it seems set to be a growing area of policy activity in future. Nevertheless, at this stage it seems to be a relatively minor element when compared with agricultural policy, and many questions need to be addressed if it is to be more successful in future.

Orienting New Professionals To Small Isolated Communities

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Abstract

This paper addresses personal and interpersonal problems experienced by newcomers who accept professional positions in small isolated communities. Gougeon suggests that many newcomers who move to new communities experience a form of culture-shock. Gougeon reviews several sociological models drawing on the works of Tonnies, Durkheim, Dillman, and Connor. He argues for a more intuitive interpersonal model that derives from the area of Sociology of the Family Literature and may hold greater utility for newcomers. Finally, Gougeon critiques the model and explores how it may prepare new professionals moving to small isolated communities.

Small communities do not generally have major educational and economic institutions and therefore lack the resources to prepare its local citizens to serve its own members. Communities require services of professionals including doctors, teachers, nurses, lawyers, administrators and managers; and most professionals are trained in metropolitan area institutions. After graduation, professionals frequently relocate to rural areas to secure employment. Many find work in small isolated communities.

Professionals, although well trained to respond to situations in their field, are rarely prepared for social differences that confront them when they move to new rural communities. Many cultural differences exist between large urban environments and small isolated communities. This paper will explore how to orient professionals to rural community life during their training programs. I will first introduce the concept of culture shock, review Tönnies', Durkheim's, and Dillman's understanding of intrinsically and extrinsically motivated relationships, and finally explore strategies to help professionals set reasonable expectations for cultural differences.

Culture Shock

Culture is one's sense of familiarity with long-standing social conventions, religious behaviours, expectations, values, attitudes and beliefs, traditions, physical environment, and deeper-level, intuitive connections with the broader universe. In a more general sense, culture shock occurs when people must learn to deal with the stress brought on by changes in home life, friends, job, and/or cultural environment (Hachey, 1998). Culture shock is a term used to describe the stress brought on by all these changes. It is the response to unfamiliarity of social conventions of a new culture, or if familiar with them, being unable or unwilling to perform according to these rules (Furnham & Bochner, 1989). Expatriates living in a new culture experience uncertainty and anxiety because they cannot predict comfortably people's reactions to them. This is especially true when they find themselves in a religious or social context that is unfamiliar. Expatriates experience loss of security when they experience uncertainty.

After examining the literature on culture shock, it is generally agreed that people experience it in predictable stages. Most report that there exists four or five stages. Funham and Bocher report that expats first experience elation and optimism in anticipation of experiencing a new culture, then frustration, confusion, confidence and finally satisfaction (1989). Storti reported that expats first experience a honeymoon stage, followed by a stage of hostility and aggression, adjustment, and finally acceptance (1990). Yang reported that expats experience excitement, disillusionment, confusion, and finally positive adjustment (1992). Hachey identified the following stages: Honeymoon Stage when you can't wait to see and experience everything, Anxiety Stage which is associated with homesickness, boredom, sleepiness, irritability, and compulsive behaviour, Rejection or Regression Stage when you find yourself becoming antisocial (rudeness, excessive drinking) or seek out safe havens like a Canadian Club, and finally the Adjustment Stage during which time you experience a measure of bi-culturalism (greet people in local language, hail a cab, etc) (1998). Hachey suggested that there are usually two low points in a person's experience overseas – the first point coincides with the anxiety stage and the second stage often comes in the Rejection stage and may be more serious and profound than the first. But people finally reach the fourth stage of Adjustment.

In each case the expat is initially excited and optimistic but quickly becomes confused and frustrated. During this stage people feel anxiety, and self-doubt becomes central. Then as the expat interacts with people from the host country and is able to begin to meet affiliation, connection, and collectivity needs with others, the expat becomes more optimistic again and becomes more willing to adjust. After several months at this stage, the expat slowly becomes more acceptant. I argue that professionals moving to small isolated communities experience culture shock, and understanding stages one will predictably experience, they may move through the stages more effectively.

Intrinsic and Extrinsic Motivation Experiences

In the late 19th century, Ferdinand Tönnies, a German sociologist, examined the nature of relationships people entered (Sorokin, 1928). He described two: *Gemeinschaft* and *Gesellschaft* relationships. A Gemeinschaft relationship was described as a natural relationship, one that might exist between a mother and child. Motivation to maintain a Gemeinschaft relationship might be love or intense affiliative needs. On the other hand, a Gesellschaft relationship was described as a relationship that yields rewards based on cost-benefit calculations. The motivation to maintain a Gesellschaft relationship might be a "bottom line" or some payment in cash or kind. Therefore a Gesellschaft relationship is conditional on the expectation that profit will result, and that a person's individualistic needs are being met. Rural sociologists quickly discovered that this typology was useful in understanding the different experiences one has in rural versus urban environments. They identified that more interactions in small isolated communities were Gemeinschaft in nature compared to interactions that people in urban or metropolitan areas experience. People from urban areas experienced more Gesellschaft relationships.

Durkheim, a German sociologist, also argued that two types of relationships existed (Sorokin, 1928). He called a relationship that created homogeneity of individuals and binds people into one solid unity (a collectivist tendency) Mechanical Solidarity. The force that unified people was a sense of strong unanimity of public opinion, based on the mental and moral homogeneity of individuals. Mechanical Solidarity is similar to Tönnies' Gemeinschaft. The other relationship identified by Durkheim was created by the division of labor seen to be critical in the Industrial Revolution. Workers needed each other and could not exist without cooperation because everybody would do only a special part of the work. Durkheim called this phenomenon Organic Solidarity and it is similar to Tönnies' Gesellschaft. Rural sociologists preferred to use Tönnies' concepts, probably because of Durkheim's unfortunate choice of names for his concepts, for they did not characterize the phenomena well.

Don Dillman, a rural sociologist, suggested that all communities have four variables that result in fundamental differences effecting social interaction and social dynamics of its members: Smallness, stability, similarity, and overlapping institutional memberships (Dillman, 1987). In urban centers there is a large population, people tend to be job-focused and therefore move more frequently, the workforce tends to be varied and complex, and people live in relative anonymity from each other. In small isolated communities, the population is small, people tend to be place-bound and focused on the community more than they are on a particular profession or job, the workforce tends to reside in one or two major resource-based industries and people tend to understand them, and people seem to live in a 'goldfish bowl' where everyone seems to know what everyone else is doing.

Many differences in social dynamics between an urban context and a rural context can be traced to these variables. Generally, *goals* are enacted differently in urban and rural contexts. In rural contexts social norms tend to be set and maintained informally whereas members of urban communities tend to set and maintain them formally. Decisions are often made in rural communities to suit the particularities of the membership whereas in urban settings decisions are made to meet a more community-wide, universal standard.

Another difference in social dynamics that occurs as a result of the four variables can be called *initiating roles*. In rural communities members are generally expected to take on complementary roles, whereas complementary roles are not as important in larger urban areas. People in rural areas are often given roles based on their family background, whereas in urban areas, people are generally required to possess a particular skill set to take on a job or a role. People in rural communities tend to value traditional experience held by elders or old-timers whereas in urban areas people tend to rely upon expert authority to solve their problems.

A third difference in social dynamics that occur as a result of these variables can be called *following roles*. In rural areas neighbours tend to have relatively unlimited obligations to one another, whereas in urban areas, obligations to neighbours are more specific and often limited. Rural community members generally pride themselves as being self-sufficient and capable of solving many different types of problems where urban people are not. Rural people tend to be more aware how their actions might affect other people in the community, and therefore act with greater group oriented than people in cities. And finally, on a daily basis, rural people tend to experience higher quality and quantity of primary relationships compared to people in cities. This may be a result of the sheer numbers of people one interacts with in a day. People living in an urban context will see as many if not more people on a daily basis, but fewer of them will likely be good friends or family, and therefore they will experience more secondary relationships.

Considering the works of Tönnies, Durkheim, and Dillman, a theme is revealed. The theorists reflect a polarity of social experiences. Tönnies' Gemeinschaft, Durkheim's Mechanical Solidarity, and Dillmans's rural characterizations all reflect intrinsic qualities while their Gesellschaft, Organic Solidarity, and urban characterizations reflect extrinsic qualities. Intrinsic qualities are associated with feelings of well-being derived from within ourselves. Intrinsic qualities lead to feelings of self-worth, intimacy, adequacy, and security. They also lead to experiences with the community that result in feeling a sense of identity, adventure, opportunity, and status. On the other hand, extrinsic qualities are associated with feelings of honour/shame, acceptance or rejection, potency or manipulation, and autonomy or coercion. They also lead to experiences with a community that result in feeling a sense of admiration or social isolation, challenge or self-estrangement, success or powerlessness, and dominance or meaninglessness (Mitchell and Spady, 1977).

Intrinsic and extrinsic experiences are not predominantly rural or urban, but people who more consistently interact in secondary relationships might have higher quality extrinsic and lower quality intrinsic experiences. Predictably, professionals who grow up in metropolitan areas are more likely to feel comfortable with Gesellschaft relationships than professionals who grow up in small isolated communities. Therefore they might expect to set and maintain social goals formally, live without concern for maintaining complementary roles, depend upon expert advice, give to neighbours in a conditional manner, and generally interact with strangers on a daily basis.

Professionals who relocate to a small isolated community need to consider what some implications are to live in a Gemeinschaft context. This context might demand that social goals be set and maintained informally, and that decisions they make may need to meet the particular requirements of individuals within the community. It might also mean that professionals live a life that is appropriate for their status and position in the community, and that the professional learns to value traditional wisdom in place of rational expertise. Professionals may need to contemplate what it means to have neighbours who consider them to be renewable resources, expecting them to provide assistance whenever necessary unconditionally. Finally professionals need to consider what it will be like to live in a community where everyone seems to know what they are doing every minute of the day.

Strategies to help Professionals Set Reasonable Expectations for Cultural Differences

Moving to a small isolated community, to many, may be a genuine cultural change. In this case, professionals who move to culturally different communities may experience the stages associated with culture shock. Hachey suggested several strategies to help a person through the stages of culture shock. 1) Get out and socialize with the locals and try to learn about your new community. 2) Stop being over critical and over examining people's behaviours and habits. 3) Try to learn the local idioms or language and practice it in public. 4) Find a local person as a mentor or supporter. 5) Remain curious. 6) Do something stereotypically 'urban' every once in a while. 7) Stay on email with family and friends back home or keep a diary. 8) When confronted with expectations that are difficult to meet, find imaginative ways to circumnavigate them without offending people. 9) If you are too overzealous about your work, you might have to reduce your expectations. And finally, 10) Accept that you are going to fail at things and prepare yourself for this as a natural phase of adjustment (1998).

In addition to these strategies, professionals must understand that they will experience loneliness and loss of connection with friends and families. When our affiliation needs are not being met, we feel unbalanced and often struggle with the accompanying sense of loneliness. To help, it is a useful strategy to remember our sense of self when our accustomed relationships are so radically changed. When we move from a metropolitan areas to a small isolated community we can expect no longer sensing honour, acceptance, potency, and autonomy. We may be used to feeling admiration, challenge, success, and dominance over our workplaces back home. We achieved these feelings from demonstrating skills of technical prowess, establishing a high moral standard, being demanding to details, and acting in a politically appropriate manner. Therefore, professionals must expect to experience fundamental changes in how they perceive themselves.

However, in small isolated communities, many of these skills and attributes are not as highly valued as possessing traditional wisdom, being charismatic, claiming fundamental rights, and demonstrating self-reliance. These authentic experiences lead to feelings of self-worth, intimacy, adequacy, and security. They also lead to experiences with the community that may result in feeling a sense of identity, adventure, opportunity, and status. However a person cannot experience these feelings just because they have prior achievements that were gained outside the community. They can only be experienced through relationships with community members, and this will take time, even years. So an important strategy a professional needs to adopt is to lower personal expectations, be patient, and therefore be more open and accepting to differences.

Conclusions

Professionals tend to move to small isolated communities to gain employment and they encounter culture shock. Considering Tönnies, Durkheim, and Dillman's characterizations of communities they can understand the fundamental nature of relationships that may occur. Drawing on Mitchell and Spady's concepts of intrinsic and extrinsic motivation, professionals can create a gestalt of one's experience with others and with the community.

Finally, using this information, professionals can better prepare themselves by lowering and realigning expectations, and understanding that self-esteem and acceptance will likely be dependent upon interactions they have with community members on a daily basis, and not on skills, knowledge, or status that they may bring with them from outside.

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The Regional Australia Summit: An Inclusive Approach To Policy Development

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This paper describes the development and conduct of the Regional Australia Summit held in October 1999. The Summit was a national event initiated by the Deputy Prime Minister. It provided an opportunity for a cross-section of people from regional, rural, remote areas to contribute their views and perspectives on how the challenges facing those parts of Australia could be addressed.

The paper provides background on the Summit including information on the type and range of participants, aims and objectives and the key theme areas. It also reports on the outcomes of the Summit, including key priorities and strategies identified by participants, and describes the process that has been established to follow-up on the Summit outcomes. The paper provides a current picture of the needs of regional Australia as identified by people from the grass roots.

Background

At his National Press Club speech in February 1999, the Deputy Prime Minister and Minister for Transport and Regional Services, the Hon John Anderson, MP (Anderson, 1999) spoke of his concern that in much of rural and regional Australia there is a deep and palpable sense of alienation, of being left behind, of no longer being recognised and respected for the contribution being made to the nation. He also expressed concern that Australia was at risk of splitting into two nations.

John Anderson went on to announce that he would convene a summit, to address the difficulties and challenges facing rural and regional Australia. The Summit was held from 27-29 October 1999, at Parliament House in Canberra. The aim of the Summit was to develop a partnership between the government, business and community sectors to deliver a better future for regional, rural and remote areas that are facing significant change. The objectives of the Summit were to:

- develop a national appreciation of the challenges facing regional Australia;
- gather ideas on how these challenges can be met;
- establish a series of goals for Regional Australia; and
- identify the roles that government, the corporate and community sectors should take in achieving these goals.

Australia, like many other countries is dealing with the enormous changes occurring in society, partly related to technological change and globalisation. The issues raised in the National Press Club speech by the Deputy Prime Minister indicated a concern for some of these longer-term and structural issues facing the country. In the political process, these longer-term objectives are often at odds with short term election cycles. In a fairly bold and risky move, he was prepared to test a creative and very public mechanism to ensure an inclusive approach to these challenges. In addition, his objectives for the Summit illustrate that he was prepared to challenge the traditional roles of each of the sectors in dealing with major public policy issues. As outlined later in the paper, the engagement of the corporate sector was a key element in this approach.

Summit Themes

The major themes explored at the Summit through specific working groups were:

- communications,
- infrastructure,
- health,
- community well-being and lifestyle,
- government – local, state, federal,
- finance and facilitating entrepreneurship,
- value adding to regional communities and their industries,
- new industries and new opportunities,
- community and industry leadership,
- education and training,
- philanthropy and partnerships, and
- sustainable resource management.

Participants

Participation in the Summit was by invitation only. A Reference Group was established to advise the Minister on participants. The Reference Group attempted to obtain a broad mix of participants across all parts of Australia, across relevant industry sectors as well as the community sector. It also attempted to achieve a reasonable gender balance and significant indigenous and youth participation. Representatives from state, territory and local governments were also invited. Over 600 nominations and expression of interest were received.

There were a total of 282 delegates to the Summit. This number included some 50 high level attendees who were specifically invited to a concurrent meeting. This group included Federal Cabinet Ministers, chief executive officers from Australia's major companies and political leaders from the States and Territories. The strategy here was to focus attention at the highest level across all sectors on the issues in Regional Australia and build support for the notion of a partnership response.

Public servants and politicians were not formal delegates. The two portfolio Ministers attended the Summit but indicated they were there to listen and learn. Their speeches were restricted to opening and closing remarks.

A web-site was also established prior to the Summit with all background papers and other information about the Summit being made available. During the Summit itself, the website was hot-linked to the public broadcaster's (Australian Broadcasting Corporation) website, where the plenary proceedings were audio streamed live and papers were put on the site immediately. The site proved to be very popular with 11,500 pages requested from the site during the week of the Summit and a further 8,900 PDF documents downloaded during October and 10,380 PDF downloaded during November.

A free call phone and fax and electronic mail 'Solutions Line' was also established to provide more people with the opportunity to contribute their answers and solutions to the challenges facing regional Australia. These lines operated in the week leading up to and during the Summit. The input was analysed daily and was provided to delegates.

Theme Working Groups

Working groups were established in the 12 theme topics (outlined above) and over 8 hours of the program was devoted to working group time. Background papers were commissioned in each topic area and were circulated to all attendees. Facilitators were engaged to work with each of the working groups. They were experienced facilitators who also had some content knowledge in their particular theme area. Their remit was to act as agents to stimulate discussion on the specific theme between members of the working group and to ensure that working groups used the opportunity provided by the Summit to develop clear and concrete priorities and strategies. Not unexpectedly, the extent to which this occurred was variable.

Outcomes

The Summit was a high-risk political strategy. There was concern that it would raise expectations as to what the Federal Government could deliver. Responsibility for addressing the issues raised varies across jurisdictional boundaries between Federal and state local governments. There was also a concern that the Summit would provide a very public venting about the Government's role and commitment to regional Australia.

What became very evident at the welcome reception was a very palpable positive and up-beat atmosphere. While many participants saw this as only one step along the way, they also recognised the significant opportunity being provided to them to influence government decision-making.

A small working party of Summit participants was established to develop the Summit Communiqué (1999). It was headlined: "REGIONAL, RURAL AND REMOTE AUSTRALIANS WANT TO DETERMINE THEIR OWN FUTURES"

This summarised the key message that was delivered by participants. The Communiqué went to say, "Delegates to the Regional Australia Summit agreed that regional (including rural and remote) Australians want to shape their own futures. This should be in a journey of partnership. The Summit acknowledged that regional Australians have a long and proud history of adaptability and creativity. However, to respond to the opportunities of the next millennium and the many challenges currently confronting regional Australia, the Summit has agreed that new partnerships now need to be forged among Governments, business and communities – all of whom have to play their part.

The Summit called for the new partnership to be based on respect – renewed respect for regional Australia on the part of urban Australians".

The Communique outlined the outcomes to emerge from the Summit deliberations and given the mix of participants probably reflects reasonably well current thinking in regional areas of Australia. The key points were that:
"There are no easy solutions to the problems facing regional Australia. These problems are shared by many countries.
Community development will not happen without government, business and community stakeholders each making their various contributions towards locally developed plans within a regional context.
Communities that have re-invented themselves have identified and capitalised on their natural strengths, resources and self-interest to enhance their environmental assets and generate economic and social development.

Communities want to share responsibility with government for development of their regions. Communities don't want solutions imposed on them. One size does not fit all.
Government, industries and communities must invest significant ongoing resources in skilling, learning, education and training, and leadership to develop the human capacity of regional Australia. Communities want to include and invest in their youth.
One of the most extraordinary assets of regional Australia is our unique natural environment, a natural heritage that is

a rich and evocative element of our national identity. The Summit recognises that mistakes have been made in the management of the natural resources, which contribute so much to our current wealth and quality of life. All Australians share a responsibility to restore the productive capacity of our rural landscapes for the benefit of current and future Australians.

Governments, industries and communities must ensure affordable, reliable access to telecommunications

Indigenous people are stakeholders in regional Australia.

Governments must accept responsibility for facilitating adequate provision and maintenance of basic infrastructure.

Governments, urban business and industry must become more responsive to the unique requirements of sectors and areas of regional Australia in designing and delivering programs and services.

- The three tiers of governments must remove unnecessary regulatory impediments, which increase the cost of doing business and stifle innovation and action in regional Australia.
- Governments must create a climate, including tax incentives, which encourages investment for rural enterprise and philanthropy.
- Key business leaders expressed their support for the idea of partnerships but sought commitment from the Federal Government to "take some risks" which would assist business, rather than create barriers that serve to hinder private sector investment in regional Australia. Their view was that tax incentives were a crucial factor in attracting investment to areas outside the major metropolitan areas".

Each group identified 4-5 key priorities, major issues and challenges and proposed strategies to address these. They also identified what players need to be involved to implement the strategies. Approximately 250 specific strategies were recommended by the groups and presented to the plenary by the facilititors on the last morning of the Summit.

Post-Summit Implementation

At the conclusion of the Summit, the Deputy Prime Minister announced the establishment of the Regional Australia Summit Steering Committee to develop a plan for implementing outcomes from the Summit. The Steering Committee is comprised of attendees at the Summit and includes a range of community, church, indigenous, and academic representatives from around the country. .The Steering Committee has been asked to take a stewardship role in carrying forward and ensuring action on the Summit deliberations and to work to deliver the outcomes identified by the Summit.

Vision For Regional Australia

Since the Summit, the Steering Committee has developed an implementation plan. In this plan, it identified a Vision that is guiding the thinking and work of the Committee and will be commended to the Government and other stakeholders as providing an inspirational goal, which they should embrace. This Vision is for: ***A strong and resilient regional Australia which has the resources, recognition and skills to play an equal role in building Australia's future and is able to turn uncertainty and change into*** *opportunity and prosperity*

In developing advice on a comprehensive strategy for responding to the outcomes from the Regional Australia Summit, the Steering Committee has been guided by the following principles:

- governments, businesses and communities have a joint responsibility to address the problems facing regional Australia and should work together in a spirit of partnership;
- a "bottom up" rather than a "top down" approach should be built into responses aimed at empowering communities at the local level;
- responses should be sufficiently flexible to cater for the particular circumstances and needs of regional, rural and remote communities.

The Steering Committee has argued that changes brought forward must deliver economic and business development, equity of service access in regional communities and community empowerment.

The Committee is also reviewing the recommendations to make sure that proposals it recommends meets the need for:

more flexibility to meet the unique circumstances and needs of individual communities;

- improved access to government assistance programs.
- improved access to services from government, business and other organisations;
- closer co-ordination between the different levels of government;
- national strategies or minimum standards;
- new government mechanisms or processes;
- improved information and communication;
- options to stimulate business investment in regional Australia;
- improved human resource development including education and training,;
- leadership development and building of community capacity;
- the provision of physical infrastructure critical to community development or local industry development.

The next phase of the Committee's activities will see it focus on the engagement of stakeholders beyond government, including the corporate and community sectors and the development of partnerships that could see the take-up of Summit recommendations that go beyond of the role of government.

The Committee has undertaken to report to Summit delegates and other interested stakeholders in May and October of this year on progress.

Regional Australia Summit Taskforce

The Federal Government has also established a Taskforce comprising Secretaries of all relevant Federal Government portfolios. This will ensure that the response to the Summit will be coordinated on a whole-of-government basis. The Taskforce has a focus on activities within the Federal government while the Steering Committee has a broader focus. The two groups nevertheless are working closely together to refine and develop policy ideas and options arising from the Summit for presentation to the Government reports will also be made available.

Conclusion

The Regional Australia Summit tested an unusual process at a national level to develop policies and programs sympathetic to regional Australia. This approach was very much in keeping with the message being delivered by rural and regional communities, that is, that people living in regional areas know their problems and should be empowered to develop and implement appropriate solutions. From a policy perspective it has provided for a creative mix of priorities and strategies. While there was some inherent danger in facilitating such a large and public method of policy-making, it was been useful in raising the profile of regional issues at a national level and in sensitising the bureaucracy to these issues. The mechanisms established to follow-up the Summit recommendations have also been substantive. At the time of writing, it is not possible to evaluate the final product, but many delegates and commentators have acknowledged that the test of the process will be in the Government's response to the recommendations.

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Creating An Academic And Rural Community Network To Improve Diabetes Care

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Abstract

The South Carolina Rural Interdisciplinary Program in Training (SCRIPT) is a United States Government funded rural immersion experience that is team taught by faculty of the Medical University of South Carolina, staff of the Low Country Area Health Education Center (AHEC) and selected community members. Quality Improvement (QI) has been a central component for the rural interdisciplinary course since 1995. South Carolina (SC) has the nation's second highest rate of diabetes, but only half even know it. High rates of complications of diabetes are very prevalent in the Low Country with one county having the highest mortality rate in the State. Students were linked with The Diabetes Connection, a Healthy Communities Project of PRO Hampton County with the aim "to determine the effects of a community diabetes screening and education project on screening participants". The key measures of improved patient performance on self-care were: (1) 87% saw a doctor (2) 35% added care changes to daily schedules (3) 38% valued self-care more (4) 79% initiated routine blood sugar checks (5) 79% changed food purchased and eating habits. Lessons learned included: (1) Changes in self-care can be affected by a combined screening/education initiative; (2) Changes in self-care can be measured. The ongoing community action has united academic and community groups and facilitated student skill development in quality improvement and changed behaviors of a target group of diabetic patients in a rural community setting.

The South Carolina Rural Interdisciplinary Program in Training (SCRIPT) provides practical educational experiences for students from multiple health care majors (eg. Medicine, nursing, occupational therapy, physical therapy, health administration and other) in a rural community in the Low Country (southern region) of South Carolina, USA. Faculty from the Medical University of South Carolina join with the Low Country AHEC staff to plan and present coursework in a five-week intensive summer session. Two sessions of approximately 25-30 students each are conducted each summer.

The SCRIPT Program

Since 1993, the South Carolina rural Interdisciplinary program of Training (SCRIPT) as prepared 161 students from multiple disciplines to be culturally sensitive health professionals prepare to function in a multidisciplinary health care team in a rural setting. Students from health administration, medicine, nursing, pharmacy, and occupational and physical therapy have enrolled in a 4 semester-hour elective offered in an intensive 5-day-a-week, five week session. Students are immersed in a rural community through practice in their own specialty, collaboration in interdisciplinary team activities, partnership with community residents in the promotion of health, and participation in community social activities. By actually living and working in a rural community, students experience the challenges of rural health care and observe the opportunities for a positive, high quality lifestyle, both personally and professionally. A January 1999 survey of program participants who had earned degrees in their respective professions found that 51% of the SCRIPT participants had chosen rural practice.

The SCRIPT program is truly a collaboration between rural communities in the Low Country of South Carolina, the Low Country Area Health Education Center, the Medical University of South Carolina, and a number of other institutional and community partners. Families in several communities provide housing for the students during their experience. University faculty facilitate interdisciplinary interaction and exposure to diverse cultural patterns in the community. AHC staff make the arrangements for housing and training sites and provide educational support services and classroom facilities. And health professionals from the communities integrate students into the rural health care culture as they precept them in clinical experiences. Funding from the Bureau of Health Professions of the United States Government provides a stipend for students and financial support for human and material resources.

SCRIPT Learning Activities

Part of the learning experiences in SCRIPT centers on the completion of a student Community Oriented Primary Care (COPC) project. Continuous Quality Improvement (QI) [*]concepts and tools were integrated in all course learning activities in 1996. The "Model for Improvement", proposed by Langley, Nolan and Nolan (1994), was provides a framework for class learning activities and also for facilitating ongoing improvements in the course. The QI process focuses on three primary areas of concern:

- AIM: What are we trying to accomplish?
- CURRENT KNOWLEDGE: How will we know that a change is an improvement? What measures will we use?
- CYCLE FOR IMPROVEMENT: What changes can we make that will result in improvement?

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[*] The term *continuous improvement* is used in this article to encompass the concepts of continuous quality improvement (CQI).

One, perhaps more, of change is chosen for pilot testing using the Plan-Do-Study-Act (PDSA) Cycle. The PDSA Cycle is basically a "trial and learning" approach that applies the scientific method. The process starts with a hypothesis that the chosen change will lead to an improvement. Next the change is planned and implemented, relevant data are collected and analyzed, and conclusions are drawn regarding the hypothesis. The next step to take is based on what was tried and learned from the cycle for improvement. The identification of the next step leads to initiation of another PDSA cycle and continual movement toward improvement.

SCRIPT students learn and apply the model primarily in two course activities: a personal improvement (PIP) project and the community-oriented primary care (COPC) project. The students are introduced to the model and given the PIP project instructions at the orientation session. They have about a month to complete their PIP project. On the first (didactic) week of practicum, the students give a brief oral report of their PIP project and submit a written report.

Using CI to Improve the COPC Learning Activity

Based on 1996 and 1997 student feedback, several opportunities for improving the COPC learning activity were identified:

- Lack of focus, clarity, or specificity of projects
- Lack of student input into the project -- students felt that the 1997 COPC project was too "packaged" and they simply did what they were told to do
- Lack of time to define, develop and fully implement a COPC project -- the groups had five Fridays to work on their COPC projects. It took a lot of time to understand the needs of the communities and to plan what to do. The six-week session did not give much time to pilot test and to implement a change.
- Linking Academic Learning Activities to Community Action

To deal with the problem issues, the faculty and Low Country AHEC staff decided to narrow the scope and increase the specificity of the COPC project. The Diabetes Connection (DC) of the PRO Hampton Healthy Communities Project was identified as a good community linkage for the COPC project for several reasons: (1) it is a viable local community health initiative; (2) one member of the Low Country AHEC staff was already heavily involved with the DC project; (3) the PRO Hampton Project had already completed a community needs assessment, in which diabetes was identified as a top priority community health problem; and, (4) the DC completed a health screening in March 1998 and had expressed a need to conduct a follow up impact study of the screening.

The SCRIPT team met with key DC community residents in May 1998, primarily to clarify the overall aim of the DC ("to decrease the morbidity and mortality due to diabetes in Hampton County") and to identify a DC need that students could address. The DC identified need was to "know what lifestyle/behavior changes occurred among the target population since the screening, and the driving forces and barriers to lifestyle/behavior change". The information would be used to guide the DC committee members and community health groups/individuals in deciding the most appropriate interventions (e.g., education, support group) to address the needs of the diabetes community. An integral part of the plan was a format that would be used to present the community need, how it was identified and the significance of the need to the SCRIPT students. In addition, student feedback and written course evaluations would be used to determine if the change in the approach to the COPC project would also a yield a course improvement in 1998.To let us know whether these interventions would result in course improvements in 1998.

The Diabetes Connection Community Action

The Diabetes Connection is an ongoing Healthy Communities project in rural Hampton County, South Carolina. It seeks to reduce morbidity and mortality related to diabetes in a state that ranks second in prevalence of diabetes. Since its inception in 1997, the Diabetes Connection has involved the following activities: (a) financial support of two Hampton County health professionals to become certified diabetic educators, (b) ongoing communication with residents via a monthly column in the local newspapers and periodic radio spots, (c) development of a monthly diabetic support group, and (d) development of a screening process for diabetics and those at risk for diabetes to increase early diagnosis of diabetes.

On March 28, 1998, 159 individuals were screened by the Diabetes Connection. Thirty-eight percent (60) of those screened had been previously diagnosed with diabetes. Sixty-two percent (99) of those screened were at risk for diabetes, based on the American Diabetes Association risk assessment test. Over half (60) of those at risk had elevated blood pressure, 14 had fasting plasma glucose (FPG) levels between 110 and 125mg/dl or Impaired Fasting Glucose (IFG), while 11 had FPG levels greater than 126 mg/dl. Of the 60 diagnosed diabetics who were screened, 77% (46) had elevated blood pressure, while slightly less than half (27) had elevated Hemoglobin A_1C levels. Over half (39) of the diagnosed diabetics who were screened needed follow-up for potential kidney and foot complications and 25% (15) were advised to receive follow-up eye screenings.

From the initial planning stages, The Diabetes Connection realized the need for post-screening follow-up of its participants, especially those at high risk for the complications associated with diabetes. Several steps were taken to provide adequate follow-up care. Immediately following the screening, clinicians were contacted by letter and informed of their patient's screening results. Results falling outside of the normal reference ranges and recommendations for follow-up of physical findings were highlighted. Providers were urged to contact patients to schedule appointments for further assessment.

Data were needed to evaluate the Diabetes Connection's screening efforts.
The following questions provided the focus for structuring the evaluation: (1) Had follow-up care been obtained by those for whom it had been recommended? (2) Had the recommended behavior changes occurred? (3) What were the barriers that prevented follow-up care and behavior modification?

The 1998 COPC Project
As a result of pre-planning, the 1998 students started their COPC project with a specific project aim already defined. They immediately focused their attention on identifying the measures or indicators they would use to let them know they were achieving the project aim, and specific change(s) they could try and test that would help them achieve the project aim.

Two interdisciplinary teams of students enrolled in the South Carolina Rural Interdisciplinary Program of Training (SCRIPT) back to back six-week sessions focused on finding a way to assist the Diabetes Connection in evaluating the screening activities.

As part of the SCRIPT experience, students form interdisciplinary teams of four to five members worked closely with Diabetes Connection committee members to evaluate findings and plan further action. The first session team of 27 students chose to design a telephone survey as an evaluation tool. The survey was validated in three steps: (a) Two diabetes experts reviewed the first draft and recommended changes, (b) The survey was presented to the Diabetes Connection for a second review, and (c) A pilot telephone survey was conducted to determine the ease of conducting the survey via telephone. The final revision was presented to a team of SCRIPT students enrolled in summer session for implementation and evaluation.

The second session SCRIPT students fine-tuned the survey tool and then conducted a telephone survey of 57 of the 60 diagnosed diabetics who had been screened. Thirty-nine (68%) of the 57 individuals telephoned were reached and completed the survey.
Findings

Of the 39 respondents, 34 (87%) had been seen by a health care provider since the screening. Data revealed that while needed rechecks for cholesterol, high blood pressure, and blood glucose control had been obtained, foot care and eye follow-up had been neglected.

The number one lifestyle change after the screening was in the area of nutrition and diet modification, with 31 (100%) responding that they had eaten healthier since the screening. In addition, 46% (18) of respondents said they had made some change in their physical activity, attributing an increased desire and awareness of the need for this change to the screening.

Support by family and friends was the number one motivator for changing glucose monitoring, diet, and exercise behaviors. Overall, the average respondent felt they were knowledgeable about their diabetes and that the screening reinforced this awareness. Those surveyed had a strong desire for the screening to be a yearly event and for the monthly support and education group to provide the knowledge and skills training needed to help them improve in the areas of diet, exercise, and glucose monitoring.

Barriers to control of their diabetes included lack of social support, lack of funds, and a feeling of isolation. The factors associated with improved control of diabetes were social support and health insurance, which also facilitated access to care.

Recommendations

The SCRIPT students made three recommendations based on their analysis of data (QI). First, there is a need for improved access to care among diabetics in Hampton County. Second, The Diabetes Connection should increase its social support network. Finally, skills training in menu preparation, cooking methods, and exercise should be provided for diabetics.

Community Impact

Since the 1998 screening and follow-up survey The Diabetes Connection has increased its activities based on the evaluation. A diabetic support and education group has been organized and meets monthly. Cooking classes facilitated by a local registered dietitian and a home economist are offered quarterly. Screening has become a yearly event. And a walking program is being developed. With the help of SCRIPT students, The Diabetes Connection has taken steps to improve diabetes outcomes in rural Hampton County, South Carolina. The ongoing community COPC project has united academic and community groups and facilitated real change related to student knowledge and the recognition of needs of a target population (diabetics) in the community.

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Personal And Professional Adjustment Of Social Workers To Rural And Remote Practice: Implications For Improved Retention

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Abstract

High turnover of rural practitioners is common among a range of human service professions. This paper outlines the results of a longitudinal investigation of Australian social workers who started in rural positions in 1994-95. The study surveyed 123 newly appointed social workers that had geographically relocated to rural positions with an identical questionnaire every three months over an 18-month period. It investigated the nature of the adjustment process to the demands of rural practice and rural living, following a rural relocation. In particular, the study explored the relevance of the concept of a U Curve of adjustment, which postulates phases of disorientation, honeymoon, grief and loss, withdrawal and depression, and adjustment. The adjustment process is analysed for its effects upon the length of stay of workers, and their social and emotional well-being. Particular emphasis is given to results concerning respondents' satisfaction with their jobs, rural lifestyles and communities, stress levels, and depression. The study has relevance for a range of human services professions. The paper concludes by providing some recommendations concerning strategies for increasing retention.

Rural Australians experience significant disadvantage in accessing quality human services, including medical care, educational facilities, and social and welfare services, when compared to their urban counterparts (Cheers, 1990, 1998, p.29-37; HREOC, 1996, 1999). Rural professionals tend to experience the same sorts of lifestyle and practice issues (Montgomery, 1999). There has been long-standing difficulty in attracting and retaining experienced professionals across the human services (Boylan & King, 1991; Hayes, Veitch,

Cheers & Crossland, 1997; Kamien & Buttfield, 1990; Tate, 1993). Reasons cited for recruitment and retention difficulties include inadequate employer supports for relocation and rural practice, and personal and family issues stemming from rural relocation (Cheers, 1998, p.91-3). Despite the generally rapid growth in the health and welfare industries (Franklin & Eu, 1996; McDonald, 1999), including rural employment opportunities (Condliffe, 1991; Munn, 1990), significant recruitment and retention difficulties exist for Australian rural social workers (Cheers, 1998, p.191-193; Dollard, Winefield & Winefield, 1999; Lonne, 1990).

Lonne (1990) proposed that, following a rural relocation, professionals experience a process of social and emotional adjustment, which typically takes 12 to 18 months to complete. It has five phases, namely, Disorientation, Honeymoon, Grief and Loss, Withdrawal and Depression, and Re-organisation and Adjustment. Each phase is recognisable by its major symptoms. Whilst each phase is identifiable by the feelings and behaviours associated with it, not all workers experience every phase, nor each phase to the same degree. There is a large degree of commonality in the process for all practitioners, regardless of experience, job description and agency function, although some social workers are more likely than others to adjust successfully.

Aims and Designs

This paper examines results from a two-year longitudinal study of 194 social workers, 123 of whom relocated immediately prior to commencing rural positions in Australia in 1994-1995. Overall study aims were to: investigate recruitment and retention difficulties; examine the impacts of the 'culture shock' following relocation upon length of stay; and determine the applicability of Lonne's (1990) proposed process of adjustment. This paper focuses on the sub-sample of workers that relocated and provides support for the hypothesised adjustment process and its affects on length of stay. It also explores the implications for recruitment and retention of rural professionals.

All respondents completed an initial questionnaire shortly after commencing duties and a second questionnaire when they left their jobs or two years later, whichever came first. The 123 relocating respondents were also surveyed with an identical questionnaire every three months for 18 months. Mailed questionnaires were used, supplemented, where appropriate, by telephone interviews. Response rates exceeded 96.2% for all seven data-collection points because of high interest from respondents and telephone follow up. A pre-test resulted in acceptable alpha values for all instruments.

A social worker was defined as a person who is eligible for membership of the Australian Association of Social Workers and who is undertaking social work practice. Social work practice was defined as paid employment of a social worker, with one or more roles or duties in a practice field recognised in the social work profession. A rural community was defined as a bounded locality with a population of 76,750 or less, and located more than 100km from the relevant state capital (see Griffith, 1991). This population limit was set to ensure inclusion of several larger regional centres with well known recruitment and retention difficulties.

Findings

The Social Workers, their Jobs and Communities.

Most respondents were female (74.6%), who tended to be young (under 30 years) and single or never married, compared with males who were generally aged between 30 and 39 and more likely to be married or separated. Respondents revealed a fairly even spread between the age groups of 21-29 (36.3%), 30-39 (35.2%) and 40-49 (23.8%), with few aged above 50 years (4.7%). Combining age and prior experience: 25.1% were young (<30yrs) and inexperienced (<2yrs); 11.5% were young, though experienced; 37.3% were older and experienced; and 26.2% were older, though inexperienced. Most respondents (76.6%) had experienced more than 2 years of rural living before commencing their current positions.

Most practitioners lived in the same communities in which they worked. Around one-third were working in communities with less than 10,000 people, one-quarter in communities with between 10-25,000 and 25-50,000 population respectively, and approximately 10% in larger places with up to 76,750 people. The major employer was state government departments or instrumentalities (74.2%), with 7.2% in federal government agencies, 9.8% in non-government organisations and the remainder in local government and tertiary education institutions. Most positions (91.4%) were full-time. More than one-quarter of respondents (28.4%) were in temporary positions, 58.2% were permanent, and 13.4% were on time-limited contracts. Most employers (69.9%) did not provide practitioners with material or financial incentives to practice in their rural locations. Furthermore, most respondents (54.0%) had received poor preparation for rural work during their tertiary studies, and no or little information and advice (61.4%) from their employers about the positions and communities they were entering.

Contrary to popular beliefs, the majority of respondents (62.9%) had lived in rural, not urban, places immediately prior to taking up their current positions. Only 29.9% of relocatees had come from their present state capital city, with a further 12.2% relocating from another state capital. Most (41.7%) had relocated from other rural places with less than 50,000 people, although 15.7% had moved from non-capital cities with more than 50,000 people. The mean distance traveled in the relocation was 1394km, although this varied widely (sd = 1191km). Geographic isolation was generally evident, with 62.9% of respondents being more than 325km from larger centres with more than 100,000 population. Whilst most relocatees (56.2%) had received a financial contribution from their employers, on average this only met around 80% of their respective relocation costs. Nevertheless, despite reporting that they were worse off financially as a result of the move, respondents were overwhelmingly positive about their rural lifestyles and relocations, with 74.8% being either 'strongly in favour' or 'in favour'. Only 8.9% had regretted the move. Partners were similarly positive toward the move.

Motivations for Positions.

Respondents' mean expected duration of employment was 24 months (sd = 18.5 mths), with 33.7% expecting to stay up to 12 months, 32.1% between one and two years, and 34.2% more than two years. This latter group tended to have permanent or contract status. They were also more likely to be experienced practitioners, in supervisor or management positions, on higher salaries, and primarily motivated to take their positions by career advancement or material gains.

Respondents were principally attracted to their present positions because of their professional interests, career advancement, and the attraction of a rural environment. 'A strong desire to work in this practice field' was the most frequently reported primary motivation, and also figured highly amongst secondary and third motivations. A good fit between the position and respondents' professional skills was also frequently cited as a primary, secondary and third reason. The perceived advantages of rural practice and a rural lifestyle were prominent amongst secondary or third reasons, but were infrequently mentioned as primary motivations. Relocatees were also more likely to have taken the position because they preferred rural work and lifestyle, believed it was an ideal locale, had a partner who had a local job, or because it was their only job offer, rather than for other reasons.

Length of Stay.

The mean actual length of stay was 16.1 months, although this varied considerably (sd = 8.1 months). Around one-third of practitioners stayed up to twelve months (34.4%), between 13 and 24 months (32.8%) and more than two years (32.8%) respectively. However, the 31.0% of practitioners who had remained in their initial position at the two-year point, the 'stayers', had not yet completed their tenure, and often intended to stay longer. The 'retained leavers' (29.3%), on the other hand, had left their initial position but had remained with their original employer, albeit in a different position. The turnover rate is most accurately depicted by the 39.7% who had left both their position and employer, the 'non-retained leavers'. The expected duration of employment and the mean actual length of stay of these groups are presented in Table 1.

Multiple and logistic regression analyses were undertaken to identify factors contributing to practitioners' actual length of stay. Three retention categories were identified:

- premature departure – leaving the position before 75% of the particular practitioner's expected length of stay;
- retained – leaving the position between 75% and 125% of his or her expected length of stay; and
- enhanced retention –staying in the position more than 25% longer than initially anticipated.

All regression equations accounted for between 50% and 85% of total variance in the dependent variables. Premature departure and poor retention were related to employer-controlled, rather than personal factors. Employer variables included: temporary tenure; employment in non-government organisations (because these were generally unable to provide adequate incentives and supports); lower salary levels; inadequate access to training opportunities and useful administrative supervision; high levels of after-hours work; emotional exhaustion; and employment in specialist, rather than generic, positions. Personal factors contributing to premature departure were negative predisposition toward rural living and practice; low involvement in community activities; no, or few, local friends; being 30 years or older; and being male. Rural community factors included moderate or high visibility in the community, and living or working in communities with larger populations (>50,000).

Enhanced retention was related primarily to personal and community factors and, to a lesser extent, employer factors. Personal influences included a positive disposition toward rural practice and living; a positive attitude toward the relocation; relative youth; being experienced; having lots of local friends; and a moderate amount of involvement in community activities. Rural community factors included being within 200km of a city with over 100,000 population, living in a community with more than 10,000 people, and having only a moderate amount of visibility. Influential employer variables were provision of adequate incentives, professional supports and supervision, more than two hours of relocation advice and information, and higher levels of worker autonomy. Enhanced retention was also associated with the line manager being based more than 50km away. Practitioners in generic practice with more practice fields were also more likely to stay longer. A critical dynamic of successful rural practice was working within the context of strong professional and community support networks and being involved in local community activities, but not to an extent that involves high visibility, frequent after-hours interruptions and compromised privacy. Employer supports redress the material disadvantages of rural living, and enable the worker to contribute to, and benefit from, the lifestyle advantages of rural practice and living.

Adjustment Process.

Eleven key indicators of adjustment were measured over the 18-month period. The U curve of adjustment proposes that well-being initially decreases over the first 6 to 9 months when a period of depression is experienced, and is followed by increased well-being during the period of adjustment (Lonne, 1990). The SPSS General Linear Model analytical procedure was used, which is a MANOVA analysis that handles repeated-measures data, and within-subjects, mixed designs to examine differences in means as well as the influence of between-subjects factors and covariates (Bryman & Cramer, 1999, p.157-162; Kinnear & Gray, 1995, p.121-128; Morgan & Griego, 1998, p.215). Essentially, it determines whether there is a statistically significant degree of change in the dependent variable means over time and whether the between-subject factors demonstrate significant differences in means. Statistically significant changes in U curve adjustment variables were difficult to substantiate, because those who experienced the most severe adjustment were more likely to depart prematurely, thereby making it hard to detect statistical evidence for a rise in well-being in the latter stages of the adjustment period.

Satisfaction with Rural Lifestyle

This variable, along with the next four, was measured on a 7-point, ordinal scale. Results indicated a U curve trend, although the 8.5% drop in satisfaction levels between Time 1 (T1) and Time 4 (T4), and the 14.0% rise between T4 and T6 were not statistically significant. However, the 20.4% drop for those who left their position between T1 and their mean 10-month departure point was significant (p = .001). These results indicate that, although there was a discernible adjustment trend, it was only statistically significant for those who left their jobs. Furthermore, those who experienced the biggest decreases in satisfaction with their rural lifestyles tended to leave their positions.

Satisfaction with Current Rural Community.

There was a statistically significant 13.0% drop (p = .012) from T1 to T3 on this variable, but a non-significant 5.6% rise from T3 to T5. Once again, the 21.5% initial drop for those who left their positions was significant (p = .007), indicating that those who left tended to be dissatisfied with their local community. Factors associated with large drops in satisfaction included high levels of emotional exhaustion and after-hours work, and poor administrative supervision. Those who had smaller decreases in satisfaction were likely to have experienced more emphasis on rural issues during undergraduate training, two hours or more of employer-provided adjustment briefing, higher location incentives, and a positive relocation attitude. They also tended to be in medium-sized communities with between 6 and 15 local colleagues, and to have had a moderate involvement in community activities.

Satisfaction with Job.

In keeping with other studies (Dollard, et al. 1999), job satisfaction for these rural practitioners decreased during the initial period then leveled off over the 18-month period. The 20.0% decrease from T1 to T4 was significant (p = .001), but the decrease for those who left their jobs was even greater (28.6%). Similar influences to 'rural community satisfaction' were evident, as were positive influences from lower community visibility and more local friendships, and negative influences from work troubles and being co-located with a line manager.

Perceived Well-being

On the whole, this variable showed a general U curve with a statistically non-significant drop from T1 to T4 (8.2%), and a rise from T4 to T6 (9.6%). The 16.5% initial drop for leavers was significant (p = .025). There was a slight rise from T2 to T3 before a further fall to T4, which was not significant, but lends support to the proposed Honeymoon period (Lonne, 1990). Employer adjustment briefings, a positive relocation attitude, slight community involvement, between 6 and 15 local colleagues, and increased local friendships were again positive influences upon satisfaction levels. On the other hand, emotional exhaustion, no community involvement, poor employer supports, working in a job with mandatory authority and being a manager/supervisor were all associated with decreased satisfaction levels.

Perceived Degree of Coping.

As with perceived well-being, a quadratic trend was evident for coping levels (Coakes & Steed, 1997, p.141): an initial decrease, a subsequent increase, then a decrease, followed by another final increase. Nevertheless, an overall U curve was present. The 14.7% decrease from T1 to T5 was significant (p = .007), as was the 11.6% rise between T5 and T6 (p = .011). The rise from T2 to T3 before the dip to T5 lends further support to the notion of a honeymoon period occurring shortly after relocation. Respondents who tended to have large drops in coping ability included those who had experienced less emphasis on rural studies in their undergraduate courses, younger workers, the less experienced, temporary employees and those with initial negative dispositions toward rural living.

Productivity Level.

This factor showed a clear, though inverted, U curve trend. There was a 15.6% rise from T1 to T3 (p = .004) and an 8.3% drop from T4 to T7 (p = .026). The initial 6.7% rise in productivity levels for leavers, although not significant, suggested that those who adjusted poorly experienced a rise in performance levels that was much less than others. Employer incentives and relocation assistance were associated with higher productivity, whereas lack of experience with rural practice and rural living had the opposite effect, as did being co-located with a line manager.

Belongingness to Community.

The sense of belonging increased steadily in a straight, upward linear trend. There was a 31.4% increase from T1 to T4 (p = .0001), and a 28.0% rise (p = .001) for those who left their positions. These data confirm that rural job turnover does not result from community factors. Increased belongingness was associated with greater community involvement, more friends, greater community acceptance of the social work role, a rural-to-rural (rather than urban-to-rural) relocation, and a positive relocation attitude.

State Anxiety Level.

State anxiety moved in a quadratic trend. A 3.7% increase from T1 to T2 was significant (p = .033), but other rises and falls were not. The leavers experienced a large 13.2% rise in their anxiety levels over the study period (p = .009). Further analysis showed that those who adjusted poorly with respect to this variable tended to leave prematurely. Factors associated with increased anxiety included higher levels of trait anxiety and emotional exhaustion, increased age, less than two years rural living experience, and being co-located with a line manager.

Strain and Stressfulness of Life Stress Events.

These two variables displayed similar trends, indicating that relocation and the Disorientation phase are associated with high levels of stress and strain, which fall significantly over the first 6 months of rural residence. Stress levels were reduced by employer-provided adjustment briefing, managers being located somewhere else and having local friendships, whereas they were increased by poor access to training, emotional exhaustion and rapid organisational change.

Perceived Level of Depression.

This variable displayed a weak (inverted) U curve trend. There was a 5.7% increase in depressive symptoms from T1 to T4 (p = .15), and a 6.7% decrease from T4 to T6 (p = .080). Once again, the rise in depressive symptoms was significant (p = .005) for those who left their jobs, reinforcing the earlier suggestions that unsuccessful adjustment was associated with decreased well-being and premature departure. Employer adjustment briefing, rural-rural (rather than urban-rural) relocation, being young, single and female, having more local friends and higher community acceptance of the respondent's work role were all associated with decreased depressive symptoms.

Conversely, higher depression levels were related to a negative rural disposition or relocation attitude, high levels of emotional exhaustion and trait anxiety, and having a manager based in the community or nearby.

The Process of Adjustment.

In sum, there was general support for the proposed process of adjustment, albeit with some qualifications. Whilst many variables displayed either a U curve or an inverted U curve trend, the changes were not always statistically significant. Those who left their positions generally experienced greater (and statistically significant) changes during the initial period of decreased well-being. Undoubtedly, their absence during the period of adjustment made identification of significant rises in later well-being much less likely for the group as a whole.

Recommendations

This study has demonstrated support for a U curve process of adjustment for rural relocatees on a number of variables and has implications for their recruitment and retention.

- High turnover has to be acknowledged as an 'employer' rather than a 'rural community', 'rural living' or 'personal' problem.
- Employers and practitioners need to recognise that a U curve of adjustment exists and is potentially detrimental for some. They also need to implement strategies to address issues that arise during the adjustment period.
- This study has found that there is, in Australia, a pool of experienced and committed rural social workers that prefer rural work and move from one rural job to another. They should be specifically targeted in recruitment strategies.
- Better educational preparation for the demands and rewards of generalist and community-embedded practice is required.
- As well as the usual information about the position, recruitment packages should also include information about the community. These should highlight features of the locale; position characteristics, especially the field/s of practice; and the financial and other material incentives on offer. Packages should present the job as an opportunity for a positive change of lifestyle.
- Enhanced employer incentives and benefits aid recruitment and retention by increasing applicant motivation and commitment. Relocation costs should be reimbursed or highly subsidised.
- Rural appointees should be provided with in-service preparation, including detailed information and discussion about the position, the community and its dynamics, and relocation and adjustment issues, prior to commencing duties.
- The overuse of temporary tenure is counterproductive and should be curtailed.
- Managers and supervisors need to provide more useful and regular administrative supervision and better access to training, and reduce excessive after hours-work
- There should be regular review of employee well-being to ascertain areas for assistance and enhance practitioner success and impact.
- Employers can provide more opportunities for professional autonomy and responsibility, and increased promotional and career-advancement opportunities

Conclusion

There is support for the hypothesised U curve process of adjustment following relocation to a rural community. During the first 18 months, there is an initial period of decreased well-being followed by increases in satisfaction. Many practitioners experience significant personal and professional problems, and these contribute to high turnover. This study has been an initial attempt to explore these difficulties, but much more research is needed. It has demonstrated that employers and practitioners can implement effective strategies to decrease turnover and increase retention. Rural citizens deserve the same access to qualified human-services professionals that most city dwellers take for granted. Social justice demands nothing less.

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Table 1: Expected and Actual Length of Stay

Length-of -Stay Group	Mean Initial Expected Job Duration (Months)	Mean Actual Length of Stay (Months)
Non-Retained Leavers	20.4	12.1
Retained Leavers	21.5	13.2
Stayers	31.7	24.2
Total	24.0	16.1

A Healthy Communities Initiative In Rural Alberta: Building Rural Capacity For Health

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Abstract

The David Thompson Health Region (DTHR), situated in central Alberta, serves 190,000 people, two thirds of whom live in rural areas. In this paper, we describe how the DTHR has brought the principles of the healthy cities/healthy communities movement together with practical strategies for assessing and building capacity in four rural communities. Key lessons learned from integrating community capacity assessment/building with a healthy communities initiative are: i.) the capacity assessment process appears to be effective in raising awareness, stimulating dialogue, and fostering learning about the community's ability to work effectively together to improve health; ii.) discussion about community capacity must begin early in the healthy communities process; iii.) community capacity assessment appears to be most useful and effective when communities are planning actions to improve health and well-being; iv.) the importance of following capacity assessment with actions to build capacity cannot be underestimated; and, v) we as facilitators of a capacity building initiative need to continue to build our repertoire of capacity building knowledge and skills. The paper concludes with suggested directions for future research and opportunities for collaborative research in rural communities.

Health professionals are today more aware than ever that the challenge of creating and sustaining healthy places -- settings in which all people can achieve health and realize their potential -- can only be met with the collective and cooperative effort of community members. Efforts are shifting, then, away from programs meant to "deliver health" and toward projects and activities that build up the capacity of communities to work together at creating the conditions under which they can thrive and prosper. In this paper, we describe how one health authority in central Alberta, the David Thompson Health Region (DTHR) has brought the principles of the healthy cities/healthy communities movement together with practical strategies for assessing and building the capacity of our communities.

We want in particular to focus upon how our Healthy Communities Initiative (HCI) has been implemented in four rural communities. This is in part because ours is a largely rural region: of our current 190,000 residents, approximately 60,000 live in the city of Red Deer and the remaining two thirds live in what we consider to be rural areas. (This is not a description based on the Statistics Canada definition of urban, which is any place of more than 1,000 population, but one which reflects our experience that villages, towns and rural areas have a way of life that distinguishes them from centres whose population is 20-, 30-, 50,000 or more.) Our focus upon rural communities is, however, also driven by a sense that the healthy communities approach may take on a different form and meaning in this setting.

After all, when the World Health Organization's Healthy Cities concept was first brought to Canada as an organized process, it took the name healthy communities because, as Manson-Singer (1994) relates, "In Canada, there are many communities and relatively few major cities. Renaming the project ensured a broader base of participation and a uniquely Canadian approach to the Healthy Cities movement, because all sizes of community were welcome" (p. 108). The term healthy communities has been adopted as well for several American examples, including California, Indiana and the Colorado Healthy Communities Initiative (CHCI), on which the DTHR's process was modeled. Conner et al (1998) argue that "the high percentage (64 percent) of rural and frontier communities involved in CHCI is unique for a healthy communities program.... Due to this important difference, CHCI provides the opportunity to learn special lessons about the development and outcomes of healthy communities projects among rural and frontier communities" (p. 22). Without joining the chorus of those who claim uniqueness, we hope in our own way to contribute to a better understanding of how the health of rural communities can be advanced and strengthened.

The Healthy Communities Initiative in the David Thompson Health Region

In April, 1998, the David Thompson Health Region (DTHR) launched a Healthy Communities Initiative (HCI) in five communities, one urban and four rural. As noted above, the HCI process which we have used is based upon that of the Colorado Healthy Communities Initiative (CHCI). The CHCI process, unlike many healthy community models, is well defined and has been extensively evaluated since its inception (Conner et al, 1999). In essence, the process involves (a) the creation of a widely shared vision of a healthier community; (b) an assessment of current realities and trends including both community needs and capacities; (c) the selection of key priority areas for action; (d) the creation and implementation of action plans; and, (e) evaluation and monitoring of actions through the development of community-level indicators to help assess progress toward the vision. Communities are free to revise and adapt the process according to their unique character and needs.

The following are core principles that guide the DTHR's healthy communities work. First, it is based on a broad definition of health; not the traditional biomedical conceptualization of health as merely the absence of disease but a wider perspective which acknowledges the critical contribution that income, employment, education, social support networks, healthy child development, the physical environment and gender make to health. Second, the essence of the HCI is building upon existing community resources and capacities, rather than adopting a "needs" approach that emphasizes deficits and problems. Third, the HCI aims to achieve community ownership through broad public participation. This ensures that the process leads to priorities and actions that have been identified by the community as a whole, rather than by select interest groups. Fourth, the impetus for collective action in the HCI is seen to be a shared vision throughout the community of a healthier future. The perspective is long term, rather than "quick fix". Fifth, because the HCI focuses on the broad determinants of health and because it aims to get communities working together as a whole, collaboration between multiple groups and sectors is crucial. Such collaboration allows initiatives to be linked, resources pooled, and duplication avoided. Ultimately, this requires change at the systems/sector level so that policies which support partnerships and collaboration can be developed and implemented.

These activities and principles would seem in many ways to fit well with the nature of rural and small town life. Rural communities, for instance, are generally more homogeneous than urban ones, and therefore ought to find it easier to arrive at a commonly shared vision. Residents in rural communities, as well, are described "as being more self-reliant than urban people…. more apt to use family, friends and local groups (e.g. church groups) for support" (Alberta Heart Health Project, 1999, p.17). Thus, rural areas ought to understand and approve of a capacity building approach. Finally, rural areas normally do not have the same agency and service delivery structure that exists in urban areas, and thus continue to demand greater public and volunteer involvement. As we shall show in this paper, our experience in the HCI both supports and belies many of the traditional assumptions about the nature of rural life.

The core of the HCI is community capacity building. We define community capacity as "the ability of people and communities to do the work needed in order to address the determinants of health for those people in that place" (Bopp et al, 2000).[1] We have identified and defined seven domains of community capacity: shared vision, leadership, sense of community, participation, resources/knowledge and skills, communication, and ongoing learning. (See appendix for complete definitions of each domain). The community is able to modify the domain definitions or create new domains if they wish.

The community capacity assessment process used in the HCI is highly participatory in nature. A formal, public meeting is held. For each capacity domain, the definition is reviewed and all participants are given an opportunity to rank the community in terms of how well developed that particular capacity is. Each person then is able to share his or her ranking and reasons for the ranking. Participants are encouraged to reach consensus on one numerical ranking for each domain. This process fosters discussion and mutual understanding. The end result is a rich and engaging dialogue about community dynamics. Verbatim comments are recorded, as are numerical rankings. The data is subsequently analysed by a small group of community members and outside experts. A detailed report, complete with recommendations for enhancing community capacity is written and presented to a core group of community members who then plan and implement actions aimed at building community capacity.

Integration of community capacity assessment and capacity building with the healthy communities process was envisioned to help communities identify existing strengths that could be applied in implementing actions, as well as to strengthen any identified weaknesses prior to, or in conjunction with action planning. In reality, each community used its capacity assessment findings in various ways which we describe later in this paper.

The HCI Communities

Of the five communities selected to participate in the HCI, four communities are situated in rural areas. Two communities, the towns of Sylvan Lake and Lacombe, are of moderate size – between 5000 and 8000 population; both are experiencing rapid growth. The remaining two rural communities, the villages of Elnora and Caroline, are much smaller in size, with populations of only a few hundred. While each community is unique, we trust that their common experience with the HCI will enable us to draw conclusions about how the process works in rural areas and about the kinds of challenges and opportunities facing rural Albertans at the beginning of the twenty-first century.

Caroline: Caroline is a scenic community located within view of the mountains, about one hour southwest of Red Deer. Population of the village is 472 with a surrounding population of approximately 2500. A capacity assessment revealed Caroline to be a community with many strong qualities but also many challenges in working together effectively. In this small town, for example, there are over forty community groups, often with overlapping goals. Key priority areas for action selected by 34 community members at a community breakfast event were: "children and youth"; "education and lifelong learning"; "individual health care and support services", and the "clean, natural beauty of our community". Progress has been slow with most emphasis on working with youth who wish to explore "best practices" in developing and maintaining youth centres, with the goal of opening such a centre in Caroline.

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[1] The HCI and a grant from Health Canada's Population Health Fund enabled the DTHR to work with the Four Worlds Centre for Development Learning to further our understanding of community capacity assessment/building. The details of the capacity assessment process that arose from our work with the communities are presented elsewhere (see Bopp et al, 2000) and the reader is encouraged to contact the authors of this paper for more information.

Elnora: Elnora is situated 45 minutes southeast of Red Deer. The town itself has a population of 250 but when the surrounding areas are included, the population reaches approximately 1600. The average age of the town population, at 42 years, is above that of the province as a whole and the proportion of seniors living in the village (26%) is more than double that of the health region as a whole (11%). With this elderly population, and given the distance to Red Deer, there is understandable concern about the accessibility of health care services and the current lack of long term care beds. Having lived their entire lives in this community, the elderly fear the prospect of being removed from their familiar and supportive environments should they require institutional care. To make matters worse, Elnora's 10 bed hospital was closed in the mid-1990s as part of the DTHR's efforts to rationalize the delivery of health care services. Not only did this remove the comfort of having a health care facility within the community, but also it weakened the town's economic base, leaving several people unemployed. Furthermore, the hospital was symbolic of the community's ability to work well together, as much volunteer labor and fund raising was involved in building the hospital.

Currently, three key priority areas for action are being addressed in Elnora: primary health care, effective communication, and enhanced programs for youth. The primary health care initiative has centered on the employment of a nurse-practitioner as well as injury prevention and first aid training projects. Effective communication is being addressed through the establishment of a community "newsroom" where information can be coordinated and exchanged. Youth in the community are striving to enhance recreational opportunities by finding a gathering place and seeking support for the construction of a hard-surfaced ball court.

Lacombe: Lacombe is a community of 8,000 situated 30 km north of Red Deer. Lacombe's interest in the HCI was captured by the process's emphasis on community visioning, an activity the applicants had already been considering for the community. In addition, the value of facilitation provided by the DTHR was deemed by Lacombe to be important. Although Lacombe chose not to undertake a formal capacity assessment, there is ample evidence of the community's ability to work together effectively. The community has a strong volunteer, church and community group base with numerous links between these and agencies and businesses.

Three priority action areas have been selected: (a) "preserve, expand, and enhance Lacombe's natural areas, green spaces, parks and (hiking/biking) trails"; (b) "increase access to all levels of care and service for seniors to ensure our aging citizens will not be forced to leave Lacombe"; and, (c) "provide for the social needs of Lacombe's teenage youth with for example, an accessible movie theatre and/or drop-in centre where they can hang out in a safe and friendly environment".

The natural areas group has focused on the preservation of natural areas within the town itself. The seniors action group began by reviewing available resources for seniors within Lacombe. Upon realizing many resources already exist, the group decided to focus on something tangible and relatively easy to start with – transportation for seniors. Again, it was discovered that there are many available resources for transportation. The issue of access to health services, then, has proven not to be as pressing an issue within the community as was initially presumed.

The youth action group has worked busily to find ways to address their social needs, which appear to be related to having opportunities for recreation through a safe, friendly place to meet, socialize and have fun. After much reflection they decided that the most important "first step" would be to have a youth coordinator who could work with them to organize activities and events. They have also formed a youth council. Throughout the process, youth have been in control, supported by adult mentors.

Sylvan Lake: Sylvan Lake is one of the fastest growing communities within the DTHR. It is a popular resort area as well as being within easy commuting distance (25 km) of Red Deer. The permanent population is approximately 5,100, but this can be several times greater during the summer. Tensions are brewing as the construction of new residential, commercial and industrial sites escalates while long-time residents and newcomers who have migrated from Red Deer and other centres to enjoy the small town atmosphere seek to maintain the status quo. Concerns about potential harm to the community's ecosystem are being raised. Increasing tourism brings many unique challenges in terms of space, safety, service provision and crime prevention. Some residents feel the community is spending too much energy focusing on tourism and not enough caring for the year-round residents. In a capacity assessment, several participants said they feel powerless against the developers who seem to forge ahead with new construction despite the wishes of everyday community members.

Sylvan Lake's vision statement focuses on five key elements of community life: natural beauty, people connecting, living together, balanced development and healthy liv. Currently, action groups are working on natural beauty, looking at both short-term (e.g.

"Communities in Bloom" competition and a clean-up campaign) as well as long-term (maintaining a healthy environment and preserving natural areas) activities. Another action group is looking at "people connecting", in particular, working with the family and children's services authority to create a Neighborhood Place – a "one-stop shopping" facility which people can access to find out about available resources.

Health Issues in the Four Communities

Four health-related issues have emerged consistently among the four rural HCI communities.

First, youth development is a priority issue. Several sub-issues have been identified by the youth: (a) a perceived lack of social and recreational opportunities; (b) a desire among youth for a safe and friendly place to "hang out" in order to have fun and keep out of trouble; (c) a sense of not belonging to the community and a desire to have greater involvement in community life and community decision-making; and, (d) a perception that youth are viewed by adults as "bad". In a workshop to identify priority issues with teens from the four communities, issues of self-esteem, communication and leadership were selected as priorities. In addition, capacity assessments revealed the need for adult and youth leadership development. Our early lessons learned in working with youth is that they highly value the support and mentorship of adults who are committed to allowing youth to drive the process. Furthermore we have learned that when youth are ready to tackle an issue, it is crucial to act immediately so the momentum is not lost. The continued viability of smaller communities depends in many ways on their ability to retain young people. Making the community more attractive to youth, and giving them opportunities for leadership and decision-making should contribute to stronger connections and less desire on the part of youth to leave the community.

A second theme emerging from the participating communities is a concern with natural beauty and preservation of the natural environment. Citizens take great pride in the natural environment and display a strong desire to maintain its beauty and integrity despite threats imposed by economic development. Since proximity to nature is one of the major reasons why people move to or remain in rural areas, there is great value in maintaining and building upon these assets.

A third theme focuses on maintaining a strong sense of community in the face of changing social dynamics. All communities in the HCI are experiencing change in their social structure. In the small villages of Elnora and Caroline, long-time residents have lamented that there is not as strong a sense of community as in the past. Out migration of youth and young adults in search of education and employment, and in-migration of retiring farmers and young families who are seeking a small town atmosphere, but who bring new and sometimes conflicting values are forcing changes in the status quo way of doing things. This is intensified in the towns of Lacombe and Sylvan Lake, which are within easy commuting distance of the city of Red Deer and can serve as "bedroom communities."

A fourth consistent theme has been access to health services, particularly in regard to seniors and access to continuing care beds. A shortage of these beds (and of funding from the provincial government) means that people requiring institutional care have been displaced from their communities and their social support networks. A recent infusion of funding from the government is supposed to help alleviate this problem. Access to other health services, particularly in the smaller villages of Elnora and Caroline is also limited. These small centres lack the services of health professionals such as physicians, and mental health workers. Transportation to larger centres for access to these services is therefore an problem for those who do not drive or own their own vehicles.

These issues are clearly not unique to rural communities. Concerns about youth, about preserving natural areas, about declining sense of community, and about access to health and other services are raised in urban areas as well, including the HCI's one urban neighbourhood. Nonetheless, in rural areas these concerns take on particular forms. Some of the issues that we might have expected to emerge in rural communities have not surfaced in the HCI to date -- for instance, the "farm crisis". This may in part be due to the fact that central Alberta has traditionally been a relatively prosperous area for agriculture. It may also reflect that the HCI process has not engaged farm-dwellers or others outside of the towns and villages themselves, despite an expressed intent on the part of all four communities to do so. Participants in the process themselves have stated that this group has not been as well represented in the HCI as would be desirable (David Thompson Health Region, 1999).

Capacity Building Issues in the Four Communities

The philosophy of community capacity building is that whatever issue is deemed most important to act upon, certain capacities are required. Community capacity is akin to the gasoline that powers a car to reach the driver's destination. Before embarking on a journey, the driver inevitably checks the fuel level and if it is low, gets a fill at the local gas station. Similarly, communities wishing to take action on their priority issues need to do their own "check up" to see if they have the fuel it will take to reach their destination. In other words, they need to assess their capacity to work together to address the priority issue. Whether communities choose to work on youth development, preservation of natural spaces, maintaining a strong sense of community, increasing access to health care services, or any other issue, they inevitably require a basic level of capacity to work together to achieve their goals.

In the HCI, we undertook formal capacity assessments in three of the four rural communities discussed here, in each identifying several areas where capacity could be strengthened. While each assessment revealed findings unique to the community there were consistent findings as well, which may be generalizable to other rural communities. These are described below.

Shared vision
Broad community ownership of a vision for a healthier future has generally not been achieved. In order for collective action to occur, more work needs to be done to ensure the vision is shared throughout the community.

Participation was consistently identified as an area in which communities wanted to do better. It was acknowledged that often a small core of people are doing "the work" of the community. However, there appears to be a lack of knowledge and skills regarding how to gain broader participation, particularly from 'hard-to-reach' groups.

Leadership
Consistent to all assessments regarding leadership was the need for further development of facilitative and participatory (vs. "top-down") leadership in both adults and youth. Dynamics of power and control were also raised in the three assessments. In each community, there appear to be people who are particularly powerful and have great control over many aspects of community life. This leaves other community members feeling powerless and consequently unwilling to participate in community affairs.

Sense of community
It was revealed that within each community there are sub-communities, each experiencing the community in a different way. All three communities identified the fact that there are groups who are "in" and those who are "out". In every instance there were people who said their community was the best place in the world to live, and those who said they felt estranged and excluded from community life.

Communication
In all communities, people identified challenges in ensuring that information was fully communicated. It was acknowledged that use of a variety of channels is important. Some people do not read, others cannot hear. Consistently, it was identified that people need to take the time to really listen to what other people are saying.

Resources, knowledge and skills.
People at every capacity meeting were easily able to identify the wealth of resources, knowledge and skills residing within their community. The only challenge is in knowing how and where to access these resources.

Ongoing learning
In terms of ongoing learning, responses were varied. It is apparent that while individual groups within a community may have well defined processes for learning from their experience, the communities as a whole do not.

Lessons Learned in Assessing and Building Community Capacity
Our findings about community capacity both support and contradict what stereotypes about rural life might suggest. Contrary to the idea that rural communities are homogeneous, the capacity reports clearly show that in each case there are sub-populations or groups that do not fit in with the dominant ethos of community life. And while there may perhaps be generally shared agreement about the ideals expressed by the community vision statement, even in these small towns it has proven challenging to achieve widespread knowledge of the vision and commitment to it as a guide for action. There are also challenges in achieving effective communication despite -- or perhaps because of -- the fact that word-of-mouth can reach a significant portion of community members. On the other hand, it was clear that all the communities possessed abundant skills and resources, and as well were quite able to obtain support and finances from outside sources.

Each participating community has used the findings from its capacity assessment in various ways. One community has acted upon several recommendations, including asset mapping to identify and locate existing resources, knowledge and skills, and working with the local child and family services authority to develop a one-stop shopping facility through which community events and activities can be communicated, and people can be connected to the resources they need. In this case, the anticipated effect of using capacity assessment findings to build capacity in order to take effective action was achieved. Another community used its capacity assessment findings to build its vision statement, but have not yet taken any actions toward addressing identified weaknesses. The third community has not fully taken advantage of the findings at this point, although the report has generated considerable discussion about how the community currently works together. All participating communities, however, have found the capacity assessment process very helpful in understanding community dynamics more clearly.

From our experience in integrating community capacity assessment and building with the healthy communities process we have learned the following. First, the capacity assessment process appears to be effective in raising awareness, stimulating dialogue, and fostering learning about the community's ability to work effectively together to improve health. Second, discussion about community capacity must begin early in the healthy communities process. This helps emphasize that the desired outcome of the process is enhanced community capacity to work together as a whole and helps the community differentiate the HCI process from other seemingly similar grant initiatives. Third, timing is everything. Community capacity assessment appears to be most useful and effective when communities are planning concrete actions to improve health and well-being. That is, "capacity for working together on youth development" is more meaningful than the somewhat abstract notion of capacity to work together in general. On the other hand, we believe there are times when it would be valuable to assess one or two of the domains – at the beginning of a community planning process, for example, in order to assess the kind of leadership that exists and the extent to which people generally participate in community events. We have learned the importance of being flexible enough to capitalize on "teachable moments" and discuss specific domains when appropriate opportunities arise. Fourth, the importance of following capacity assessment with actions to build capacity cannot be underestimated. Unless the findings of the capacity assessment are integrated into action, the entire exercise appears to be academic and interesting but not highly useful. Finally, as facilitators of a capacity building process, we must continue to expand our own repertoire of knowledge and skills for building community capacity in each of the seven domains.

Conclusion

In this paper we have presented an overview of our efforts to integrate a practical approach to community capacity assessment/capacity building within a healthy communities initiative in four rural Alberta communities. These efforts have been moderately successful, however, more research is required to understand in greater depth how the processes can best be integrated in rural communities. An issue that would be interesting and fruitful to explore would be a comparative analysis among the four rural communities in our HCI, two of which are progressing well, and two of which appear to be struggling with the process. Illumination of facilitators and barriers (both within the communities, and within our own organization) to implementing the HCI process in these various communities would help inform rural development practice. In addition, research into the four health issues identified by our HCI communities could further help inform rural development practice. For example, research to identify best practices in rural youth development, as well as finding ways to slow the out-migration of young people to larger centres would be very valuable. Research partnerships with economic development, education, and rural sociology would be a good starting place.

Restrictions on space have precluded a full discussion of the successes and challenges of implementing the HCI process within our five participating communities. We have, however, spent considerable time evaluating the HCI (see Smith, 2000; David Thompson Health Region, 1999) and readers wishing to know more should contact the authors of this paper.

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Appendix

Community Capacity Domain Definitions[2]

Shared Vision
What is it?

A shared vision is a picture of the community at some time in the future, painted in enough detail that people can imagine it.

When the goal is to build a healthier community, a shared vision is not complete unless it:

- Is realistic enough that people believe it is possible to reach.
- Presents a tension between the desired future and the current situation. This tension inspires people to take action toward reaching the vision.
- Includes a statement about how people want to work with one another in order to achieve their goals, and about the values that need to be shared in order for people to work effectively together.

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[2] Source: Bopp, GermAnn, Bopp, Baugh Littlejohns & Smith, 2000

- Is richly detailed and thereby points to a pathway (possible goals; principles and processes to be followed) for action and change.
- Is shared because it is created through true dialogue and consensus with people from all walks of life in the community.
- Is built upon individuals' needs, experiences, and aspirations - people feel they "own" it.
- Inspires and motivates community members to actively take part in making their community a healthier place to live.
- People interpret it and can tell others about it in a consistent manner.

Sense Of Community
What is it?

Sense of community refers to the quality of human relationships that make it possible for people to live together in a healthy and sustainable way.

When there is a strong sense of community:

There is a sense of place and history. People do things together and often share ways of doing things in common, such as decision-making, celebrating, or grieving, which helps give the community a shared identity.

Relationships among community people are built on trust, cooperation, shared values, togetherness, and a shared sense of commitment to, and responsibility for, improving the community.

There is a climate of encouragement and forgiveness, openness and welcoming.

Community members feel they are safe, that they have a voice, and that they can make a contribution to the community.

They also feel cared for, and in return, they care for others.

A Partnership Model For The Offshore Delivery Of A Research M.Ed In Rural Studies

David McSwan & Ron Store, Australia

Abstract

The Rural Education Research and Development Centre (RERDC), School of Education, James Cook University (JCU) and Malaspina University College (MUC), British Columbia, have developed a partnership model for the delivery of JCU's MEd (Hons) in Rural Studies. The program commenced in 1997 and has admitted three intakes. The first cohort is currently well advanced in the final (thesis) component of the course. The teaching and supervision model provides for JCU and MUC staff to work in pairs. Significant intercampus staff visitation has facilitated the development of the course as has an offshore supervisors' symposium. A recent evaluation of the course has highlighted strengths and weaknesses of the model as well as confirming some of the strategic and conceptual principles underpinning the development.

In 1996 discussions between the Director, Rural Education Research and Development Centre (RERDC) at JCU and staff at the Malaspina University College (MUC), British Columbia (BC), were held at Nanaimo, Canada with a view to co-operate in the offering of professional development courses in rural, small and isolated communities in BC. The partnership was attractive to MUC because of JCU's focus in the field of rural education. The willingness of both institutions to adapt to meet the needs of students in BC facilitated the development of the initiative. The availability of studies at PhD level in rural education provided an additional incentive for both institutions.

In October 1996 the Director proposed to the School of Education that the MEd (Rural Education) be taught off-shore at Malaspina University College, Nanaimo, BC Canada, commencing 1997.

In April 1997 a formal agreement was signed by the Acting Vice-Chancellor, JCU and the President, MUC. The agreement provided the opportunity to exit the program after successfully completing two subjects (Postgraduate Certificate of Education) or after four subjects (Postgraduate Diploma of Education in Rural Education (PGDipEd). The degree of Master of Education in Rural Education or Master of Education (Honours) in Rural Education will be awarded upon the successful completion of the prescribed program. The agreement also provided for the opportunity for a candidate who exited from the program and subsequently wished to use units obtained as credit towards a higher award (PGDipEd, MEd or MEd(Hons)). This could be done by surrendering the qualifications so obtained to JCU before the higher qualification is awarded.

In 1997 the fee of AUD $2,000 per subject was set subject to annual review. The fee is collected by MUC. Twenty per cent was retained by MUC to cover costs including advertising and publicity, administration, library and Internet. The remaining 80 per cent was transferred to JCU. This proportion has subsequently changed to 30%.

It was agreed that a minimum of 15 enrolments was required to commence the program, unless agreed otherwise in writing by the parties. JCU agreed to provide a full MEd (Rural Education) degree course, lecturing and thesis supervision staff in conjunction with MUC, and study materials. MUC agreed to provide lecturer/tutor involvement in teaching and thesis supervision, program co-ordination assistance, Internet facilities, advertising and publicity, recruitment and enrolment, library facilities and required access to other resource collections, and program research and development input.

It was also agreed that all certificates, diplomas and MEd degrees would be awarded by JCU until the parties agreed otherwise.

Dr Montgomery successfully submitted a proposal to the BC Teacher Qualification Service to gain recognition of the MEd (Rural Studies) for purposes of salary status advancement of BC teachers. This approval requires that BC teachers undertaking masters degrees complete at least 50% course work in order to achieve appropriate recognition. Non-teachers are able to complete the award by completing two (or three) subjects and a thesis of four (or three) subject equivalents.

There have been three intakes to the MEd (Rural Education). In 1997 a cohort of 14 students enrolled in the program; in 1998 a second cohort of 12 enrolled; and in 1999 a third cohort numbering 11 have enrolled.

Evaluation of program

The review methodology and analysis of results were simple, consisting of email questionnaires and interviews. Results are reported as frequency distributions and summaries of comments.

All students in the first and second cohort were sent email questionnaires which canvassed opinion on various program matters including the program curriculum, resources and resource access, administration of the program, and general

considerations. Student progression in the program was also charted. The third cohort was not included because they had just commenced the program.
Staff at JCU involved in teaching particular courses were interviewed using a structured set of questions and JCU staff involved in supervising theses of students in the program were surveyed seeking comment on their involvement. Staff at MUC involved in teaching the program were emailed a series of questions seeking comment and staff at MUC involved in supervising theses were also surveyed by email.
The finances associated with the program were examined and are reported.

The student questionnaire was developed after discussions with lecturers at JCU involved in the program. Comment was sought on the draft questionnaire from Dr McSwan (JCU) and Dr Montgomery (MUC) and subsequently amended. The questionnaire was distributed to all students involved in the first and second cohorts. The student email addresses were provided by staff at MUC. Three follow-up letters were sent to students who did not respond to the invitation to complete the questionnaire. Regrettably, there was less than a 100% return rate explained partly by the fact that the survey was undertaken during MUC's summer vacation period.

Staff interview questions and survey schedule were developed following discussions with teaching staff and thesis supervisors. Existing documentation provided useful reference points for this process.

From these data some comments and recommendations have been generated for consideration.

Results

A. PERSONAL INFORMATION
Cohort 1: N=14 Cohort 2: N=11

Q1. Occupational Area

The majority of students (74%) are involved in various levels of education although a small number are located in other occupations such as community support and community development.

Q2. City/town where you live
Only a few students indicated their geographic location which ranged over various parts of British Columbia (BC) including such places as Ladysmith, Nanaimo, Queen Charlotte City, Gabriola Island, Cedar Community, Terrace, Duncan, Revelstoke, Crofton, Zeballos and Bamfield.

Q3. Position in the program
(Editor's note: See Table 2)

B. CURRICULUM
Q4. Is the overall curriculum content relevant to your professional needs?
This question asked if the curriculum content was relevant to the professional needs of participants in the program. The responses indicate that **88%** believe that the content of the curriculum is relevant. Students commented that studying Aboriginal and First Nations will be extremely helpful, that "the course on rural studies helped ", "coursework in qualitative research was wonderful", "understand the nature of rurality better", "was particularly useful" and that "much of the information is applicable to any classroom"; another noted that "rural and indigenous elements" in particular were helpful. Students commented on the freedom given in the course to focus on interests and areas relevant to students. Those who commented negatively said that the program was too geared for teachers and that a subject on community development would be a welcome addition to the curriculum.

Q5. Are there unnecessary overlaps in curriculum content?
Students in both groups stated unanimously that there were no unnecessary overlaps of curriculum content.

Q6. Are there content areas not covered that you would like covered?
Those who answered in the affirmative again indicated a wish to have a subject on rural development while another asked for more material on "rural people who have transitioned to urban settings". In relation to the subject on research methodology it was suggested that more emphasis on analysis of quantitative and qualitative data would be useful while another student suggested that more attention be given to developing the thesis idea. One student suggested that more support in technology and APA [style] would have been helpful.

Q7. General comments on curriculum

Comments ranged from "I am completely satisfied with the program", "I am challenged by all of it" and "was a good cross-section of rural topics" to "I think it could be streamlined". Two students commented on the research methodology subject suggesting that it might be better offered as subject number three because progression to the thesis proposal would be better. (This has been done for Cohort 2). A student from the second cohort wished that examples of the previous cohort's thesis proposals had been provided in the research methodology subject. Another student suggested that "more technology tutorials should have been arranged".

C. RESOURCES AND RESOURCE ACCESS

Q8. Have the curriculum materials provided adequate resources?
Have the curriculum materials provided adequate resources?
This section of the questionnaire asked students to comment on the adequacy of resource provision,

especially access to library and electronic resources. There is clear agreement concerning the adequacy of curriculum resources (74%). Students commented that these materials are "just a start" and that they are "adequate to get one started". Another student suggested that the "texts are a useful place to begin".

Q9. Have MUC/JCU library and electronic resources been adequate?

Opinion is more clearly divided on the adequacy of library and electronic resources. Comments suggest that many students have found alternative sources for resources including visiting other university libraries. Students commented on the helpfulness and "excellent service" of MUC Library staff and academic staff although one student commented that email requests had been ignored while another noted that "by the time a reference arrives it is time to send it back again". One student noted that MUC seems to be building up relevant materials". Students from both cohorts believe that more "orientation" (presumably instruction) on the library system and finding information on journal articles would have been helpful. One student suggested a tutorial on the software Endnote.

Q10. Have you been able to use other resources (e.g., local library)?

Have you been able to use other resources (e.g., local library)?
Many students have found it difficult to access alternative resources because of their remoteness and distance from other libraries. Two students use University of Victoria and UBC libraries regularly. Three noted that they have no local library although a few commented that they "use" the Internet. Some also indicated that they use each other's resources and borrow from other professionals one student noting that "it is very time consuming".

Q11. Have JCU/MUC resources been readily available?
Have JCU/MUC resources been readily available?
Comments varied from "instructors were lending out material from their personal libraries" to "JCU access was built around time constraints I could not adhere to". One student commented that he was "not sure how to access JCU's resources" while another has "not done anything through JCU". Others praised the efforts of MUC library staff although one student commented that there were "heavy fines for overdues".. Another student suggested that "thesis copies and proposal examples … were not helpful as they did not conform to the standards by which my proposal was evaluated".

D. ADMINISTRATION

Q13. Have you found the administration of the program effective?

Have you found the administration of the program effective?

Despite the large number who registered that they thought that the program was effectively administered (76) several did provide various negative comments which ranged from a fairly generous "it has been challenging to develop an ongoing relationship with anyone at JCU" and "everyone is trying" to "have found numerous inconsistencies … JCU delivers one idea and then it is reversed by MUC and vice versa" and "I found the program very disorganised". Another said that "marks could be returned somewhat quicker".

Q14. Has information regarding course offerings, enrolments, results been readily accessible and timely?

Has information regarding course offerings, enrolments, results been readily accessible and timely?
One student who answered "yes" commented "yes, because I am a seasoned student and know what questions to ask". Another student gave a qualified "to a certain degree". This question elicited considerable negative comment including "slow and slower", "received readings at the last minute each time", "except the research course … assignments returned months after being turned in", "the time gap between assignment completion and mark distribution is generally lengthy" and "receiving course marks [with] up to six months delay is educationally unsound". Another student said that he waited "over three months to receive feedback".

Q15. Has information regarding presentation of assignments, information on progress in the course, etc been adequate?

Has information regarding presentation of assignments, information on progress in the course, etc been adequate?
Comments included statements such as "all courses were exceptionally well organised … effectiveness of (subject) delivery according to the relationship struck between MUC and JCU instructors". Another student said "Yes but the cultures subject was the only exception" and "the first subject on cross cultures was very mixed up".

Q16. Have arrangements relating to the supervision and preparation of theses been adequate (cohort 1 only)?

Have arrangements relating to the supervision and preparation of theses been adequate (cohort 1 only)?
Positive comments included "MUC don't always have the answers but they find them for you", "my MUC supervisor is encouraging", and "feedback has been supportive and specific". Negative comments included: "I have still not been officially/personally notified of the Au (sic) supervising my thesis", "there is a distinct lack of 'guidance through the process", "I hardly feel I have a relationship with my Australian supervisor" to "I have been waiting a month for comment on work … one supervisor seems reluctant to criticise ideas".
This issue needs to be addressed, especially by staff at JCU.

Q17. Any general comments on administration

Any general comments on administration

Generally, comments were positive. MUC staff were commended for trying "hard to accommodate us" "for soothing my fears" and another noted that "I am particularly happy with my JCU advisor". One student , however, noted that one "Prof didn't seem to take the opportunity to listen" when given feedback and another student was "was amazed at the casual manner in which the time frame was extended" for the program from a two-year cycle to three years.

E. GENERAL CONSIDERATIONS

Q18. Have you enjoyed the program overall?

Despite some of the negative comment noted above, there is an overwhelming view from students that they find the program enjoyable. Positive comments included "a wonderful experience", "immensely", "inspiring to find a topic and research material" and "it has provided me with an incredible opportunity to grow". One student noted that "subjects, yes, research and content, yes, thesis process, no".

Q19. As a result of this program have you changed your work practices and/or career aspirations?

Respondents commented that they had thought "more about what I am doing", that they were "more global in … my perspectives for the future" and "where I will spend the next ten years of my career". Another noted that s/he had "been offered a VP position" and attributed that to the course and one student commented that he was "intrigued how the theoretical can be incorporated into my class …"

Q20. Would you recommend this program to others in your profession?

Some students noted that they have mentioned it to people they work with ("I tell people about it all the time") and offer "pros and cons". One student "would advise others to go elsewhere" and one castigated the surveyors for asking for any contacts to whom information might be sent . Only one student provided the name of a prospective student. However, 88% of students would recommend the program to others in their profession.

Q21. Why did you choose this program over Canadian and US offerings?

Why did you choose this program over Canadian and US offerings?
Students offered the following reasons:

- Able to do it at home as distance education program
- A hearty recommendation from two close friends
- Seemed relevant … and offered a thesis component
- Physical proximity to Malaspina and previous experience with college
- Connection with the Dean of Education
- Was in the location where I wanted to apply the learning
- To my knowledge there is no similar program

Q22. Compared with what it might cost you to do a similar Masters course elsewhere, do you think that the JCU/MUC course offers value for money?

Five students agreed that this course offered value for money, two indicated that it was "competitive" while another two students said that "The $12,000 is just a lot of money" and "it is more costly than others". One student said that "all masters programs are too expensive". Another commented that "UVic offers MEd programs which are less costly (half the price) while another said that "the cost of doing a degree at any of the three major universities in BC is generally about C$20,000! One student wondered "where the fees do go".

Q23. What do you see (in order of importance) as the three main strengths of the program?

Students commented that they were able to work from home, that it is flexible, that it meets students' needs, that it is interesting and that MUC faculty have excellent teaching/supportive/encouraging credentials. Additional comments included: continue to work full time; extending rural education information; the promotion of rural work"; cost; the warmth and attention of people at MUC … the warmth and attention of most people involved in the program; ability to work at one's own pace; MUC faculty with rural experience; JCU reputation in rural research area; very appropriate area of research; an opportunity to develop a research centre in BC; good balance of courses and thesis requirements; the small amount of classroom lecture demands; freedom of finding a research topic; the interactive nature of the webct (sic) communication with fellow classmates; a free reign in choosing thesis topic; working and studying at the same time without having to give up my summers somewhere else; pulling people in from such diverse work situations and giving them an opportunity to share what they know and have experienced; available; good intentions; one of its kind in the world; time frame is more than adequate; lots of freedom and latitude to do as I wish; distance ed component; relevance of material; quality of Australian course design and instructors; access from a distance and focus on local community; manageability – one project at a time; serves the needs of a variety of professionals; appropriate to the needs of rural communities; costs; willingness and commitment of everyone involved; and the library services.

Q24. What do you see as the three major weaknesses of the program?

What do you see as the three major weaknesses of the program?

Weaknesses suggested by students include: program relies heavily on technology… difficulty of technical communication and transfer of assignments; communications breakdowns; JCU/MUC unclear expectations; costly; delays in feedback. Additional comments included: (lack of) face-to-face discussions; lack of regular contact with peers; not being in a class on a regular basis; dealing with two universities; lack of access to journal articles; lack of support in area of technology; Canadian/Australian differences (educational, cultural); lack of relevant Canadian resources; turn-around time for Au response; focus on Australian research rather than international focus; difficulty of establishing a supportive network within the class; Australian marking system does not line up with Canadian; too little time with fellow students … discussing a topic online is not the same; need more and better instruction on how to do searches and how to use the Internet; disorganisation; lack of computer strengths by students; too ambitious; it is young; distance between instructor pairs hampering their effectiveness; integrating webct (sic) into course format.

Additional comments

I have enjoyed the program and have grown significantly as a result of my studies; valuable experience .. can't wait until the thesis is complete; this is a good opportunity to develop a much needed research centre in Rural Education involving local skills and knowledge; I wouldn't trade it for the world; in email discussions someone should chair or monitor and call upon some students who seem reticent to express opinions; the workload was unnecessary … constantly rushing through an unreal schedule; I appreciate the opportunity to share my experiences … question 20 was an insult to the process.

Staff: The academic program

The MEd (Rural Studies) offered in the project is at honours level; that is, the course requires completion of the following program: two required subjects, ED 5901 Rural Studies (Dr J Montgomery, MUC and Dr D McSwan, JCU) and ED5113 Foundations of Qualitative Educational Research (Dr M Grant, MUC, and Dr K Martinez, JCU); one elective, the one offered because of the particular needs of the program being ED5701 Teaching Across Cultures (Dr K Pepper-Smith, MUC, and Assoc. Prof B Osborne, JCU); and thesis.

Subject delivery and thesis supervision

Each subject is delivered by two academics, one from JCU and one from MUC. Initially, the JCU lecturer has taken the lead in planning, teaching and assessing the subject. As the second and third offerings of subjects have occurred, the MUC academics have taken a greater role in teaching. However, as the program is a JCU course and the degree awarded by JCU, the final responsibility in all academic matters remains with JCU staff.

In practice there has been a high level of co-operation and mutual respect between JCU and MUC academic staff. The actual arrangements for teaching the subjects have been flexible. In one subject the JCU lecturer has visited Malaspina to teach each of the three cohorts in partnership with the MUC colleague. In another the JCU lecturer visited to teach the first cohort in partnership. For the second cohort the face-to-face teaching was conducted by the MUC academic with the JCU lecturer providing support with learning materials and completing assessment. In the third subject the materials were prepared in the Vacation School mode used in the School of Education; that is, subject materials, readings and assessment were prepared in print form and provided to students before attending vacation school sessions. The JCU academic prepared these materials and the major face-to-face teaching during the vacation school was undertaken by the MUC academic. The JCU lecturer supplemented this teaching with teleconferences and email contact with students.

Thesis supervision has also been conducted on a collaborative basis with each student having two supervisors, one from JCU and one from MUC.Thesis writing started in earnest at the beginning of 1999.

Views of academics involved in the project

The views of academics involved in the program have been collected using three instruments. Each academic from JCU teaching in the program (3 people) has been interviewed; each academic from MUC teaching in the program (3 people) has been surveyed; and all academics from both institutions who have been supervising theses (12 people) have been surveyed. In July 1999 a symposium was held attended by most of the academic staff from both JCU and MUC who are involved in thesis supervision in the program. This was to consider issues in the supervision process. Notes from this symposium have also been used in writing this report.

Responses of JCU Academic Staff Teaching in the Program. Each of the 3 staff members was interviewed separately.

Q1. Have administrative arrangements at JCU been satisfactory?

Staff agree that the administrative arrangements at JCU have been variable. Staff matters such as travel have been satisfactory. However, matters related to students such as enrolment, maintenance of class lists and reporting of results have been quite unsatisfactory in many instances. Reasons for this are not clear. It may be because of inadequate communication between various units within the University, for example, School of Education, Faculty, Postgraduate Admissions, Overseas Student Office. It is certainly the case that the University procedures for approving subject results and notifying students is inflexible.

There are instances of students not having been notified of results until six months after the subject has been completed. If the University supports flexible modes of course delivery, as it apparently claims to, administrative procedures need to be modified in accord with this.

Steps are being taken to address some of these problems. For example, students in the third cohort have been enrolled in all subjects and the thesis at their initial enrolment to minimise processes.

Q2. Have administrative arrangements at MUC been satisfactory?

All lecturers believed administrative arrangements within MUC have been satisfactory characterised by one respondent as "generally efficient and helpful". Some administration at the interface of MUC and JCU have caused problems, for example enrolment procedures, compatibility of electronic communication systems. One respondent suggested that MUC administrative staff should have been given more guidance.

Q3. Are MUC and JCU masters students comparable?

One respondent saw both groups of students as comparable. The two others agreed that MUC students and JCU students had differences in their undergraduate backgrounds which were reflected in their approach to the masters program. They believed that the MUC students had different understanding and skills in research and scholarly writing. However, they were seen to adapt to JCU requirements very quickly. All agreed that the MUC students had high levels of commitment and enthusiasm. One respondent noted the cultural differences that Australian and Canadian students exhibited in the academic cultural context.

Q4. What effect, if any, has the program had on your workload?

Initially JCU staff had the option of teaching a subject in the program on a paid basis, that is, above the normal workload. One member of staff took this option once. Subsequently, all subjects have been taught as part of normal load. Staff are happy with this arrangement. One staff member who has taught in the program and has been the initiator of the project and coordinator finds the administrative load demanding. He has felt a personal responsibility to "keep the focus".

All staff were enthusiastic about the program but find that it makes demands on their time, especially as the timing of teaching is not synchronous with their other JCU teaching.

Q5. Are there alternative modes of delivery you would suggest? Do you think videoconferencing would be valuable?

There has been a wide range of strategies adopted. One respondent believes strongly that face-to-face personal contact needs to be maintained between student and JCU and/or MUC lecturer, commenting that "using technology such as videoconferencing would be second best". The other two respondents see a place for the use of various technologies. One taught from Malaspina his MUC and Cairns students simultaneously by video link-up. He has also used web conferencing and believes this technology has "exciting potential." The third respondent also believes there is a place for more use of technology used in a mixed mode, for example, web, electronic delivery of materials, audio-conferencing with face-to-face tutorials at MUC. It is also noted that all three JCU staff who have taught in the program have visited MUC and met staff and most of the students. One respondent stated the need for inter-institutional visits and noted that five staff have visited MUC and a further three expect to visit by the end of 1999.

Q6. Have you found MUC staff helpful and cooperative?

All staff have found the MUC administrative staff most helpful and efficient. They have found MUC academic staff very professional, cooperative and enthusiastic. They note that academic staff have had to adjust to the British approach to thesis writing and supervision which differs in some respects from that in North America.

Q7. Are MUC staff appropriately qualified and comparable to JCU staff?

All agree that MUC teaching staff are well qualified. They all have PhDs. They have gradually taken greater responsibility for teaching and JCU staff are satisfied in the way this transfer has proceeded.

Q8. Can you suggest ways to improve the program?

One respondent suggested greater attention to the cross-cultural and cross-institutional issues that are involved in such a project. Another comment stressed the need to continue to see the project as a partnership between equals. It was noted that demand for places in the program could be increased by attracting more non-teacher enrolments. This would involve subjects in rural community development and rural economic issues.

Q9. Do you have any other comments on the project?

All three respondents were most enthusiastic about the program and their participation in it. One saw it as valuable to JCU staff in that they had to reflect on their teaching and supervision practices and explain them to academics from a different tradition. It was also pointed out that as scrutiny of completion rates has increased throughout the Australian university system this program has so far demonstrated high continuation rates which bode well for JCU's completion rates. It was noted by two respondents that the general principles of the joint program could be used to develop similar projects in British Columbia and other regions of North America. Already the BC Training Qualification Service has recognised the program and recommended it to students. Also, there has been interest from the Royal Canadian Mounted Police for a similar program with a rural law enforcement focus.

Views of MUC Staff Teaching in the Program
The three staff were emailed questionnaires. Two reminders were sent. Two responses were received.

Q1. Have you found the administrative arrangements satisfactory?

One respondent observed that "if we had waited until we had invented perfect systems we would never get a program up and running." He also noted that there have been "small glitches emerging throughout the program but that "always individuals involved have been totally supportive." Particular problems noted were the very slow proposal approval, slow ethics approval and slow return of student results.

Q2. Have you found JCU academic staff cooperative and helpful?

Both respondents were strongly affirmative; "without question, yes"; "yes... absolutely."

Q3. Are there alternative modes of delivery that you would suggest?

One respondent answered, "no." The other noted that initially software problems were frustrating and early experiences with new Malaspina system were "just horrible but . . . the bugs are gone now."

Q4. Are there any changes you would suggest to improve the program?

One suggested that the subjects be extended from 4 months to 6 months but that this could reduce the time available for the thesis. Another suggested that that working initially with fewer JCU supervisors would be preferable.

Q5. Have you found working in the program enjoyable and professionally rewarding?

Both respondents agreed they had. "absolutely positive professional experience."

Views of Academic Staff Engaged in Thesis Supervision When this review was in the planning stages, the reviewers believed that, as the thesis writing stage was only beginning, there was little need to review this part of the program. However, as the review progressed it became apparent that there were issues involved that needed to be considered. Hence, a brief supplementary questionnaire was distributed. Further, it should be noted that, since this review began, there has been a workshop on supervision conducted in Fiji to which all supervisors from both institutions were invited.

Of the 12 staff from both institutions listed as involved in thesis supervision 10 responses were received. Of these, one respondent advised that although he was listed as a supervisor he had not yet begun the process of supervision so returned a nil response. So, in all, 9 responses were used. Not all respondents answered all questions and not all questions required a simple Yes/No answer.

Q1. Did you find the advice regarding supervision that you received prior to beginning supervision adequate? (YES 5 NO 2)

Did you find the advice regarding supervision that you received prior to beginning supervision adequate? (YES 5 NO 2)
Interestingly, the Yes responses were mainly from the MUC staff. However, these were qualified in most cases with comments such as "At the time the information was given it was adequate. ... When I received my students it became obvious that it was not inadequate but contradictory [in relation to the JCU Manual]." Other comments included "David McSwan was very patient in providing us with valuable information"; "I appreciated the seminar given by Ken Smith ... more of the same would be useful."
The 2 no answers were from JCU. However this was qualified by statements such as "I have had a lot of experience regarding supervision"; "I just flew into it."

Q2. Have you found the experience of supervision in this program helpful in your own understanding and practice of supervision?

Of the respondents who answered this question 6 said Yes. There were no negative responses. In particular, the JCU staff were generally most enthusiastic. Comments included, "Yep, it's great"; and "I have very much enjoyed being a co-supervisor with a Canadian academic." They valued the opportunity provided to discuss supervision with staff from a different academic tradition and to reflect on their own practices. One MUC responded "Absolutely. I see that I have learned a great deal about supervision." Others had not supervised before and appeared tentative in their responses. "As a novice I believe I could be much more effective if I could work as part of a committee" (the North American system); and "My problem is that I am not a regular instructor in the program and as such do not have a handle on the level of development of the rest of the students."

Q3. Do you have any comments on the similarities/differences between Canadian and Australian supervision processes and thesis outcomes?

There were 3 direct Yes responses and 1 direct No. Some interesting points were made. "[My Canadian co-supervisor] and I were pretty much in agreement about standards"; "Because I had not actually met my co-supervisor I was not certain what she had said to the student. Now that we have met ... I feel much more comfortable. All communication [now] goes to the three of us"; and "The primary area seems to be in the area of contact time. In Canada usually the supervisor spends a great deal of time with the student."
Q4. Do you have any other comments?

Four respondents provided comments. They were all positive and indicated a commitment to the program. One JCU supervisor plans SSP in 2000 to include visits to MUC and to his students in their home locations; three respondents praised the Fiji meeting as pleasant, productive and helpful and one suggested it should be a regular event for each new cohort; and another stated, "I have learned a great deal from our Australian counterparts, most specifically Paul Pagliano and Barry Osborne."

Finance: Terms of agreement

Under the terms of the agreement between MUC and JCU which established the joint program the following financial arrangements were accepted:

- A tuition fee of $A2,000 per subject. As the MEd consists of 3 subjects and a thesis (equivalent to 3 subjects) the total course fee, assuming completion in minimal time, is $A12,000.

- The income generated from tuition fees to be divided between JCU (80%) and MUC (20%).

Both these arrangements could be reviewed and changed by mutual agreement annually. As MUC took a greater responsibility for teaching the course from he second intake of students in 1998 the fee division was changed to a 70%, 30% division. Fees are collected by MUC and, after deducting its share, the balance is transferred to JCU. This is lodged in a School of Education account and controlled by the Head of School.

Following the enrolment of the first cohort of students in 1997 there has been a continuing demand for places in the program. This has resulted in two more cohorts of students being enrolled in 1998 and 1999.

Annual income and expenditure

Since the program began the annual income and expenditure has been as follows (see Table 16):

Discussion: General
The program has, in general , been successful both for students and staff. The students report unanimously that they are enjoying the program and with only one exception would recommend it to others. Two thirds of the students find that it has already changed their work practices and, despite a number of criticisms concerning the delivery of the program, the overwhelming majority find information and resource accessibility adequate.

Lecturing staff at both MUC and JCU are also unanimous in their support for the program, finding it professionally rewarding and academically stimulating. The program has also been financially successful, providing a steadily growing surplus.

Given the academic and financial success of the program it is the view of the reviewers that it is to the advantage of both JCU and MUC to maintain it and to explore ways of expanding it.

Changes needed and/or conditions which have emerged since the inception of the program

Some conditions have changed since the inception of the program and much experience has been gained in implementation. This process has revealed a number of problems which need to be addressed. Some of these relate to one institution only and others to the relationship between them.

Administrative arrangements

Since the program began, a number of concerns have arisen in relation to both the general administration and the academic administration. These concerns have mainly focused on JCU.
Particular concerns about general administration have been:
- perceived lack of information from JCU regarding enrolment, subject offerings etc.;
- problems in enrolling students;
- problems in advising students of subject results; and
- lack of support in understanding and using technology.
- Particular concerns regarding academic administration have been:
- undue delays in return of assignments;
- inaccessibility of JCU academic staff; and
- lack of communication between MUC thesis supervisors and students on the one hand and JCU thesis supervisors on the other.

Electronic communication

Even within the space of two years since the program began, there have been advances in electronic communication and a greater awareness of its potential in distance education. Initially, there were major problems in electronic communication between MUC and JCU. Contributing to this may have been the installation of a new system at MUC simultaneously with the beginning of the program. These initial problems have now been largely solved. However, the general issue of the use of electronic communication in the program needs to be addressed. Students comment frequently on simple problems such as the ability of supervisors, especially at MUC, not being able to open attachments. Students perceive that JCU library electronic resources were not easily accessible. This suggests that JCU Library staff be more adequately briefed and involved in the delivery of the program.

Summary and Conclusions

The strength of the program is in the academic area, with strong approval by students and academic staff. It is pleasing to note that the comments on administration by Cohort 2 are more positive than those of Cohort 1.

There have already been expressions of interest for similar programs in BC. These include programs in rural law enforcement to service RCMP personnel; community development, and offerings suitable to federal and provincial public servants. Of special significance has been an approach from Dr J Shelton, Director, Program for Rural Services and Research, to develop a joint program with the Rural Development Centre. University of Alabama. Other opportunities may exist in offering masters programs in other faculties, for example, in rural law enforcement. Such courses could share common teaching subjects. It is assumed that for programs proposed in BC MUC would be included in initial negotiations.

JCU has embraced flexible delivery of courses. Implicit in this is the need to revise administrative procedures so that they support and encourage such flexibility. This requires, at least, the ability for students to enrol at various times during semester and to be able to receive their results shortly after completing requirements for a subject.

There have clearly been problems of communication between students and staff. Staff should be proactive in establishing communication with and responding to students. Since the inception of the MUC/JCU partnership, the School of Education has reviewed its domestic MEd program and accepted a Service Guarantee Statement for students. It is equally applicable to this program.

Given the concerns of students that JCU thesis supervisors appear to be inaccessible and that sometimes advice from the two supervisors is not consistent, it is essential that initial contacts be early, open and inclusive. The recent development of Degree rules and guidelines for thesis: Master of Education (Hons) in Rural Studies should assist in dealing with many procedural issues.

Students undertaking this program have access to JCU library resources but it is not clear that they are fully aware of the off-campus library services available or of the extensive electronic resources available through the JCU Library. Some students also expressed concern regarding their information literacy skills. Staff at both libraries could co-operate to develop appropriate information literacy packages.

In conclusion it is clear that the program to date has been very valuable to the School of Education. At a time when enrolments in the MEd have dropped considerably, the Rural Studies program is one of only two that have maintained enrolments. Further, at a time when course retention rates are becoming increasingly important in the University and across the university system, the high retention rate to date will boost the overall rate within the School. It has provided a steady and growing financial surplus to the School. It has also provided stimulating professional development for academic staff. It has led them to reflect on their supervision skills and to examine their approaches to teaching students from a different academic culture. Institutional links have been developed through staff visits to MUC and students in situ.

Many of the positive outcomes of this program for the School of Education are also beneficial for JCU as a whole: increased financial resources, higher postgraduate enrolments and higher retention rates. As well, it has enhanced the University's profile in North America and opened up possibilities for the development of masters courses to be offered in North America by other schools and departments.

MUC has been able to collaborate in offering a course at masters level for the first time and achieve a financial return in the process. It has enabled staff to gain experience in graduate supervision and allowed them the opportunity to work in productive partnership with Australian colleagues. As with JCU, it has opened up possibilities to develop further similar programs.

Table 1: Occupational area

Occupation	Cohort 1	Cohort 2	Total	%
Education				
Elementary	3	2	5	
Secondary		2	2	
Tertiary				
Other				
Teacher	4	2	6	
Administrator	2		2	
Other	1	1	2	74%
Rural Development	3		3	
Rural Health				
Community Support	1	2	3	26%

Table 2: Position in the program

Position in program	Cohort 1	Cohort 2	Total
Completed 3 subjects and have begun thesis	6	1	7
Completed 3 subjects		4	4
Completed 2 subjects			
Completed 2 subjects and have begun thesis	3	2	5
Completed 1 subject		1	1

Table 3: Relevance to professional needs

Relevance	Cohort 1	Cohort 2	Total N=17	%
Yes	8	7	15	88
No	1	1	2	12

Table 4: Content areas not covered

Content areas you wish to be covered	Cohort 1	Cohort 2	Total N=16	%
Yes	4	3	7	44
No	4	5	9	56

Table 5: Adequacy of resource provision

Adequacy of provision	Cohort 1	Cohort 2	Total N=17	%
Yes	7	6	13	76
No	2	2	4	24

Table 6: Adequacy of library and electronic resources

Adequacy of library/ electronic resources	Cohort 1	Cohort 2	Total N=16	%
Yes	4	6	10	63
No	4	2	6	37

Table 7: Use of alternative sources

Alternative sources	Cohort 1	Cohort 2	Total N=17	%
Yes	5	6	11	65
No	4	2	6	35

Table 8: Accessibility of MUC/JCU resources

MUC/JCU resource accessibility	Cohort 1	Cohort 2	Total N=17	%
Yes	5	8	13	76
No	4	0	4	34

Table 9: Administration effectiveness

Administration effectiveness	Cohort 1	Cohort 2	Total	%
Yes	6	7	13	76
No	3	1	4	34

Table 10: Information on course offerings, enrolments, etc.

Administration information accessible	Cohort 1	Cohort 2	Total N=17	%
Yes	5	4	9	53
No	4	4	8	47

Table 11: Information on assignment presentation, progress in course, etc.

Assignment information, etc	Cohort 1	Cohort 2	Total N=15	%
Yes	5	6	11	73
No	2	2	4	37

Table 12: Adequacy of supervision of theses

Adequacy of thesis supervision	Cohort 1	Cohort 2	Total N=9	%
Yes	5	0	5	56
No	4	0	4	44

Table 13: Overall enjoyment of program

Enjoyment of program	Cohort 1	Cohort 2	Total N=16	%
Yes	8	8	16	100
No	0	0	0	0

Table 14: Change in work practices

Change in work practices	Cohort 1	Cohort 2	Total N=17	%
Yes	6	7	13	76
No	3	1	4	34

Table 15: Recommendation to others

Course recommendation	Cohort 1	Cohort 2	Total N=16	%
Yes	7	7	14	88
No	1	1	2	12

Table 16: Expenditures of the Partnership Program

	Income A$	Expenditure $A	Balance $A	Carried Forward A$
1997	$16,400	$9,634	$6.766	$6,766
1998	$37,438	$33,369	$4,069	$10,835
1999*	$69,990	$10,003	$59,987	$70,822

*As per statement to 6.8.99. Outstanding commitments have been included in expenditure for 1999.

The Glocal Portal: The Public Library As A Partner In Rural Knowledge Cooperatives

Johan Koren, USA

Abstract

Knowledge is the fuel of community development. Schools and services deal in knowledge, as do businesses, and without access to it, all stagnate. Rural communities face a dual dilemma in their efforts to keep pace with knowledge developments. Their remoteness makes access to the knowledge of the world "outside" difficult, time-consuming and costly. At the same time, the very fact that there nevertheless is access of a sort can mean that local knowledge becomes lost or discarded as somehow inferior. The knowledge of indigenous peoples is particularly vulnerable. The challenge, then, will be to mobilize resources that enable access to valuable knowledge globally and concurrently mobilize resources that can conserve the best of local knowledge and, more, share that knowledge globally. The public library has been called a "strategic in-between element" between community and globality. It stands, Janus-like, as a portal providing access to information and knowledge resources through the traditional channels of the inter-library loan networks and now also through the Internet, and, at the same time, has collected locally-produced information and knowledge resources that are unique to the area that it serves. Alone, however, no single agency has the resources for such a task. Cooperation and collaboration is the key, as it was with electrification. Knowledge cooperatives are suggested as a solution, similar to the North Yukon Ecological Knowledge Cooperative, with a broader application.

Knowledge: The Resource for the Millennium

Knowledge is the fuel of community development. Schools and services deal in knowledge, as do businesses, and without access to it, all stagnate. Indeed, knowledge has been proclaimed "the currency of the new millennium." (Kochikar, 2000). The closing years of the 1990s saw a proliferation of publications touting the centrality of knowledge and the necessity to manage a company's knowledge assets, to the extent that knowledge management (KM) became established as a recognized academic subject at the graduate level and a standard text issued under the aegis of the American Society for Information Science (Srikantaiah and Koenig, 2000).

Yet knowledge is no entirely new interest that has sprung fully-fledged to human attention in the 1990s. The Wisdom literature of the Old Testament extolled the virtues of knowledge:
Choose my instruction instead of silver knowledge rather than choice gold, for wisdom is more precious than rubies,and nothing you desire can compare with her (Proverbs 8:10-11, NIV). Even before that, the Bhagavad-Gita asserted that "Knowledge, the object of knowledge and the knower are the three factors which motivate action; the senses, the work and the doer comprise the threefold basis of action." Indeed, a whole branch of philosophy, namely epistemology, has struggled with the meaning of knowledge since ancient times, as Pemberton clearly demonstrates (1998).

But why this emphasis on knowledge at this juncture in human history? Pemberton (1998) hints at one reason in his inclusion of a table delineating the evolution of the management of organizational resources, from the financial management of capital in the 1920s, through the management of manpower, materials, facilities, information, service, information technology in the successive decades following, until finally knowledge management emerges in the 1990s. Prusak (1998), however, points to a more timely cause than mere evolution: globalization of the economy, "which is putting terrific pressure on firms for increased adaptability, innovation, and process speed." Charles Leadbeater (1999) puts a more sinister twist on this phenomenon by laying the blame at the door of "finance capitalism, the most obvious and maligned force, . . . the disruptive power of deregulated, interconnected global financial markets, which swill around the world in pursuit of shareholder value." At times allied with financial capitalism, at times at odds with it, Leadbeater sees two other forces driving changes in the economy: the one harnesses the knowledge capital in "the drive to generate new ideas and turn them speedily into commercial products and services," the other channels social capital, the relationships between people and organizations, into an ""ethic of trust and collaboration . . . [towards the goal] of creating social solidarity." It is Leadbeater's conclusion that the aim of development must be "to harness the power of both markets and community to the more fundamental goal of creating and spreading knowledge." (1999).

But this allows us no opportunity to arrive at a definition of the concept of this thing that is to be created, spread and managed in the face of globalization. *Knowledge* can be as slippery a notion to pin down as *information*, and, indeed, in many contexts, the two are erroneously used interchangeably. Davenport and Prusak (1998) assert that knowledge is close to action, and echo the Bhagavad-Gita in their insistence that knowledge cannot be separated from the knower: "Knowledge exists within people, part and parcel of human complexity and unpredictability." Its key components are "experience, truth, judgment and rules of thumb." And its manifestations can be explicit or tacit: recorded in human- or machine-readable form, and the domain of records managers, archivists or librarians (Srikantaiah, 2000) or stored in the human memory, barely conscious, the knowledge of the practitioner in context (Crowley, 2000).

This concept of knowledge has consequences for education in a global economy, as Cogburn (1998) points out, citing an argument from the Global Information Infrastructure Commission (GIIC at http://www.giic.org/), an international, independent, non-governmental private sector organization:

> The globalization of the economy and its concomitant demands on the workforce requires a different education that enhances the ability of learners to access, assess, adopt, and apply knowledge, to think independently, to exercise appropriate judgment and to collaborate with others to make sense of new situations. The objective of education is no longer simply to convey a body of knowledge, but to teach how to learn, problem-solve and synthesize the old with the new. (1998)

Traditionally structured systems of education are increasingly ineffective in the production of graduates who can attain such knowledge. "More importantly," asserts Cogburn (1998), again quoting from the GIIC, "knowledge based businesses often complain that graduates lack the capacity to learn new skills and assimilate new knowledge." A crucial skill in this connection must be to come to grips with the forces which are shaping this globalization and channel the technology and the infrastructure of global knowledge to the advantage of the local community.

Knowledge in the rural context

Rural communities face a dual dilemma in their efforts to keep pace with knowledge developments in this globalized economy. On the one hand, there is the same challenge Cogburn (1998) indicates for developing countries, namely, a lack, or at best a disproportionate distribution, of access to the technological infrastructure necessary for the production and dissemination of knowledge. On the other hand, the very fact that there nevertheless is access of a sort can mean that local knowledge becomes lost or discarded as somehow inferior. The pervasiveness of Anglo-American culture on the Internet has led to fears for the survival of other cultures. The Norwegian government's action plan for information technology in the cultural arena for the years 1998-2001, "Skape, bevare, formidle" [Create, preserve, disseminate] (1997) explicitly cites the threats to the survival of Norwegian language and culture when it claims, without supporting statistics, that over 90% of the content of the World Wide Web is in the English language. In the same way, Justin Chisenga (1999) warns, unless "deliberate steps are taken to contribute to global information, the [African] continent's millions of inhabitants will never access their own content, and will forever, even in the electronic age, remain consumers of electronic information and cultural products produced from outside the continent." Nazer (1999) goes so far as to call th pervasiveness of Anglo-American content an outright "Western colonization of the Global Village."

The extent to which such fears are justified has yet to be determined. Whatever may be the case, it can be argued that native knowledge could be seen as particularly vulnerable in this regard. The culture, languages and traditional knowledge of indigenous peoples has long been under threat, both passive and active, from the dominant cultures of the nation states that have entered their ancient domains. Phebe Fjellström (1968) depicted the ethnocentrism of the Swedish crown from its earliest dealings with the Sámi (the indigenous peoples of the Nordic countries, traditionally called Lapps, a term considered offensive by the Sámi themselves, with its connotation of rags and patches, since *lapp*=patch), as far back as the 1600s and before, as it assessed the Sami economy and division of labor according to the values of the Swedish farmers' economy. Similar instances of prejudice and active (and passive) government attempts to assimilate indigenous peoples and destroy their language and culture can be documented from other regions of the world. It is interesting, for example, that, while the Norwegian government's Action Plan for IT in the cultural arena (Skape, bevare, formidle, 1997) talks of the "integration" of groups of "foreign" origin and specifically immigrants to Norway, the position of the unique native Sámi culture receives no mention. At the same time, there are the difficulties experienced by the minorities within the minorities, such as the South Saemi of North Central Scandinavia (approximately Trondheim to Bodø and east into Sweden, see the map at the end of the paper), whose language is almost as distinct from the majority North Sámi as Norwegian is from German. Efforts to preserve their distinct language and culture have included the South Saemi's own insistence on the continuance of their residential schools and a special bookmobile service instituted by the Nordland Regional Library. (Elsvatn, 1999).

Indigenous knowledge has value for rural communities, as the activities of the World Bank demonstrate (see Building on Local Knowledge, 1998-99). Sharing that knowledge and applying it to common problems is crucial. Fikret Berkes (1999) summarizes the main lessons of traditional ecological knowledge into three clusters: the combination of unity and diversity in traditional indigenous systems, the advantages of participatory, community-based resource management, and the potential of forging new and meaningful ethical principles for ecological management. Berkes writes elsewhere (1998) of the "complementarity of traditional and Western [ecological] knowledge at a practical level." A challenging model of participatory, community-based initiatives may be found in the ecological knowledge cooperative, described by Kofinas (1998) as a "collaborative alliance of First Nation organizations, co-management bodies, state agencies, and resources user communities. Its objective is to monitor the trends of environmental change." The successor would appear to be the Arctic Borderlands Ecological Knowledge Cooperative, which has established a presence on the World Wide Web, in part to meet "a need to easily find information on research and monitoring, both past and present, in the Northern Yukon and adjacent Alaska and NWT." (1999) It was decided already at the opening meeting in 1994 that "an important part of the Co-op should be to bring together science and local/traditional knowledge." (Arctic Borderlands Knowledge Co-op: An overview). There is an information page as part of the website which includes an Arctic Borderlands Database of Information Sources, which provides access to references, including reports, series of reports, file sets, map series, and data sets. Clearly, the Co-op sees part of its role as a portal to local knowledge.

The Global-Local Portal

These cooperative endeavors do not, however, explicitly mention one institution that has traditionally acted as a repository both of global and local knowledge and can therefore play a central role in the knowledge environment within the rural community. The public library has been called a "strategic in-between element" between community and globality. (Lund, 1991). It stands, Janus-like, as a portal providing access to information and knowledge resources through the traditional channels of the inter-library loan networks and now also through the Internet. At the same time, the public library has collected locally-produced information and knowledge resources that are unique to the area that it serves. Indeed, the public library as a meeting place both physically and intellectually between the global and the local gainsays the traditional discourse of opposition between the two that Robertson (1995) warns against.

Bernard Vavrek, director of the Center for the Study of Rural Librarianship at Clarion University, discusses the role of the public library in the rural community (1995), and sees a potential for the library as a provider of lifelong learning. In addition, Yu, et al. (1999) describe the development, potentials and implications for public libraries as participants and potential leaders in the advent of community networks. There are barriers, however, in the form of attitudes and paucity of resources, both financial and personnel. Nevertheless, the success stories investigated by Salmon (1999) suggest that growth, vitality and a relevant role do exist as a result of a number of factors: enthusiastic interest, careful assessment, initiative, getting help from others, planning, realizing new knowledge and learning, and, especially, cooperative efforts. And it is precisely in such cooperative efforts that rural development has traditionally been furthered, as, for example, in the area of electrification, which has been seen as a model for the development of viable telecommunications networks in rural areas (Marek, 1995, Freshwater, 1998).

A Cooperative Partner for Glocal Development

Bengt Johannisson (1994) has demonstrated "glocalization" as "a generic (small-business) approach to create competitiveness where penetration of glo-bal [*sic*] product and resource markets is combined with an advanced integration in a lo-cal [*sic*] entrepreneurial context." The local entrepreneurial context he shows from his own and other empirical evidence to be grounded in local/regional networks where an international orientation has become "a collective property," a global demand for "customized products and associated production technology" is being met, there is a high tolerance for the necessary risks involved, there are synergies involved in the blending of competition and cooperation ("coopetition", see Buchen, 1994), and finally, there exists a high degree of local ingenuity and variety.

Such a glocalization strategy, blending together the global and the local, could be best served through the creation of diverse, multicultural cooperatives similar to the Arctic Borderlands Ecological Knowledge Cooperative, where the aim is the pooling of a broader knowledge capital both locally and globally, toward the retrieval and harnessing of greater resources. A possible application can be found in the north central areas of Norway and Sweden. Saemien Sijte, the South Saemi cultural center in Snåsa, north of Trondheim, (see map) initiated in 1996 a pilot project in cooperation with tourist organizations in North Trøndelag and the North Trøndelag Regional Council. The aim was to develop "market oriented products and product packages both connected to and independent of Saemien Sijte," which could present South Saemi culture for the tourist market. (Sørsamisk næringsliv og kulturformidling, 1997). Because such product development would take time and financing, this pilot project focused on an analysis of the cultural and political prerequisites for product development and stimulation for further development. Essentially, the project was the first step in a knowledge assessment/knowledge mobilization project.

On their own, the developers of this project could not hope to develop the expertise and the knowledge required to create an infrastructure and develop and market a product that will attract tourists to the region, as Elsvatn (1999) points out. It requires input from business, tourist boards, and education in languages and launching out to foster contacts with potential visitors and tour operators from other parts of the world. It requires building a database of knowledge both local and global. Survival of rural areas demands participation in cooperative ventures of this kind, similar to the Basque Mondragon groups. MacLeod (1997) offers an optimistic picture of the benefits of cooperative participation:

> In this age of giant business and giant government, where small community groups feel powerless against forces which are destructive of their fundamental values, the community business approach offers an appropriate technology that is within the reach of all of us. It is something doable for those who are concerned about unemployment and the decline of our communities. It is something that we can do which is based upon traditional values of sharing and mutual responsibility. It is old-fashioned in many ways, but it we are to have a future, it also the way of the future. (1997).

The local public library has a clear role to play in this cooperative, as the glocal portal, standing at the threshold between the global and the local. And not only as a repository and a compiler of knowledge. The library can also furnish the physical space for meetings of this knowledge cooperative. However, here, too, critical mass is essential, in order to attract properly qualified personnel and amass a budget suitable for appropriate technology. Regional cooperation and even mergers among local municipal libraries into regional library systems like Minnesota's Traverse des Sioux Library System or leadership from the centralized regional and state libraries can provide such critical mass. Adaptation of local library networking projects pioneered by a Norwegian regional library, Nordland fylkesbibliotek (Nilsen, 2000), making possible the alleviation of limited technology and personnel resources at the local level, would provide much needed technological support and, by extension, allow greater access to global knowledge sources. The addition of other local participants combining to create a regional knowledge cooperative motivated by the shared values of community could see similar results to the famous cooperatives of Mondragon. (MacLeod, 1997).

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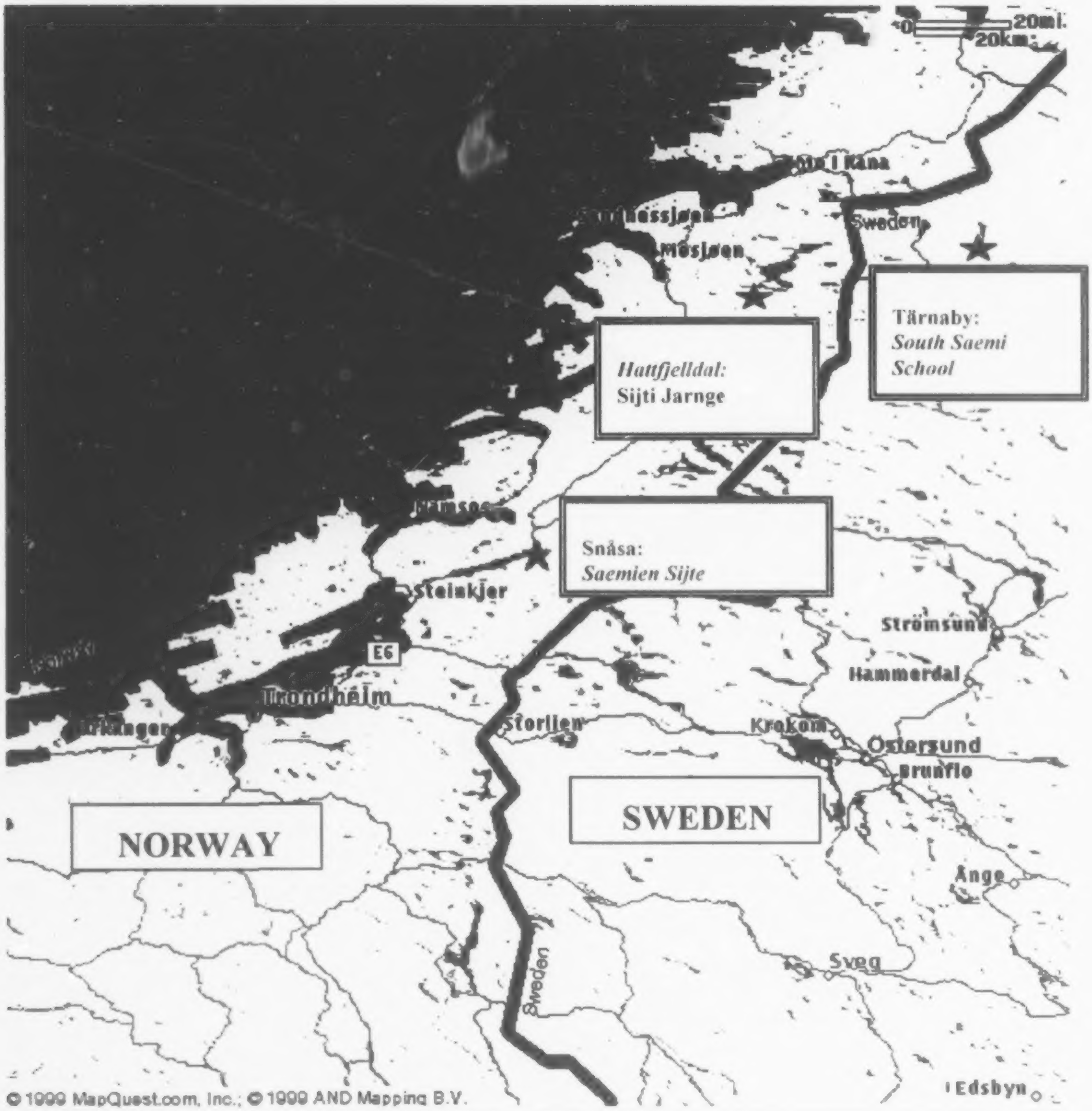
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Map showing South Saemi cultural centers

Technology Transfer, Farms, Families, And Communities: Lessons From Farm Tourism Developments

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Abstract

The transfer of Information and Communications Technology (ICT) into the rural business community does not of itself increase entrepreneurial activity in those areas. Furthermore, emphasizing, as it does, the physical separation which it is designed in part to overcome, ICT might be expected to have, at best, a neutral effect upon the local sense of community. Examples drawn from farm tourism development in England are used to explore the dynamics of business innovation on farms. The role of entrepreneurship amongst farm family members (especially, women) as agents of innovative application for new technology in the development of non-farm-but-on-farm businesses and in exploiting ICT as a support for both existing and novel but essentially local community networks, is illustrated. Enhancing the role of agriculture in defining an identity fundamental to regional tourism requires greater self-and community-awareness amongst both farming and non-farming families within rural areas. The contribution of entrepreneurial networking to successful wider rural community development is assessed in the context of regional tourism.

Community and Identity

Information and Communications Technology (ICT) has been heralded as overcoming problems of distance and isolation experienced in rural areas, especially improving contact with urban areas and services. There is, however, no reason to assume that ICT will increase the sense of community in rural areas.

Carter (1990) describes a community as "...a group of people usually, though not necessarily, associated in geographical location, (which) has a feeling of common interest, purpose and identity. It is also generally assumed that it is something to be valued." The most common interpretation of community is 'the inhabitants'; e.g. of a parish or village. It may also suggest that those people living within this area are socially interactive and bonded by living in the same place. However, as recent years have shown, the in-migration of predominantly urban middle class people to rural areas has refuted this assumption (Newby, 1988). A rural community is far more complex and, as Derounian states, the interpretation of the term community is dynamic, complex and culturally determined (Derounian, 1998).

The recent changes to rural areas have altered the shape and make up of the rural community. In-comers from urban centres have altered the composition of the rural population and, some may argue, the sense of community has been lost or fractured. The arrival of urban values has filtered into the indigenous community. The immigrants often arrive in rural areas expecting a rural idyll which is warm and welcoming and where the inhabitants help each other. In fact such people will fight fiercely to defend this idyllic vision whether it actually exists or not. However, this can conflict with views which many of the local people hold. Local people may not necessarily be against new development, especially if it provides the area with employment, housing or additional services (Newby, 1988). Therefore, in many rural areas today, the traditional community vision does not exist if, indeed, it ever did exist at all (Newby, 1988). A rural community is much like an urban community in that there exists a wide variety of people some of whom mix with each other whilst there are others who prefer not to get involved. There are also those who find a rural area stifling, a place where it is impossible to retain a private life (Derounian, 1998). This of course depends on the individual and the mixture of people within the rural area. As Derounian (1998) states, " ...'Rural Community' is ...comprised of communities within the community."

In recent years the inclusion of the opinions and needs of local communities has become a fundamental ingredient of social policies. It has been widely recognised that the community is in a key position to identify its own needs and to point out solutions to existing problems (MacArthur, 1995). The current state of England's rural areas has led to community development being placed relatively high on the political agenda. The pledge to sustainable development has highlighted the role of local communities further because "key aspects of sustainable development include empowerment of local people, self reliance and social justice" (Mitchell, 1997).

If community development is to be successful the involvement of the community is essential (Pretty, 1998). For action to be taken, all sections of the community must participate in order to be heard and for their needs to get accounted for (Johnson, 1993). Usually community development takes the form of a project initiated or funded by an external authority which provides an agent to liaise between the community and the external organisation (Derounian, 1998). The product is often a partnership between a number of authorities and members of the local community and, together, they tackle the problem. Mitchell (1997) states that for the partnership to be successful it requires six features. There must be compatibility between the participants; an ability to work together. In addition, there should be benefits to all the participants and an equitable representation of the whole community and power to bring about the desired goal. Members of the partnership must be able to communicate and be adaptable. Finally, all of the participants should have integrity, patience and perseverance.

Pretty (1998) has argued that there are many types of participation. There are manipulative participants who merely pretend to take part. There are those who only get involved if they are asked outright. The passive participator joins in the plans but allows others to make the decisions. There is also the bought participant who only partakes because there is a financial or material gain for themselves. Functional participants gather together for a common goal. Forming a group is seen to have benefits such as reducing costs and saving resources. The interactive participant makes a conscious effort to work on the project and ensure that other participants and members of the community are heard. Finally, there are the participants who work alongside the other partners but also retain the management of their own resources. A community group will often contain each or some of these types of participants. Alternatively, a group may consist entirely of one type of participant, for example self-mobilisation or functional participants.

For people to participate there must exist either a will or a want or a need as well as a sense of common identity. Simply living in an area does not automatically imply that the individual is part of a community in the traditional sense. An individual may only feel part of a community if their interpretation of community has been satisfied. Therefore, it is almost certainly impossible to have an entire population living in one area where they all share the same sense of 'community'. The term 'community' is ambiguous because whilst conjuring up a cosy and co-operative view, it can also lead to a lack of insight into how complex a certain local population is. In other words, the establishment of a sense of community identity is an extremely complex process and must already have taken place before ICT is taken up as a social, community or business tool.

Entrepreneurship and Networking

As there is no reason to suppose that ICT will create a sense of community, neither is there any reason, a priori, to assume that the introduction of ICT will, of itself, increase entrepreneurial activity. Indeed, Aldrich and Zimmer (1986) argued that formation of new businesses results from motivated entrepreneurs, with access to resources, finding niches in opportunity structures. In order to capitalize successfully on these opportunity structures, entrepreneurs must have relationships or linkages with the key components of the process that enables them to take advantage of that perceived opportunity, namely capital and other resources, such as labour and effort. They must then be able to mobilize them for ventures with no guaranteed success. Hisrich and Brush (1983) identified four key stages or phases in developing an entrepreneurial opportunity:

- identify and evaluate the opportunity
- develop the business plan
- determine the resources required
- manage the resulting enterprise created

Clearly, making use of the Internet is not one of the key stages in development.

Entrepreneurial success requires contacts, knowledge and confidence, areas that are closely linked to other aspects of life, particularly pre-entrepreneurial careers and non workplace relationships. The implication here is that individual entrepreneurs are products not only of their individual personality characteristics (eg goal orientated, self confident, enthusiastic and energetic (Hisrich and Brush, 1983) but also of their "social contexts, channelled and facilitated, or constrained and inhibited by their position in social networks"(Aldrich and Zimmer, 1986; Granovetta, 1985).

Could the growing use of ICT help negate the effects of such obstacles as lack of adequate social linkages, particularly in rural areas, where isolation and inaccessibility are often problems? It is our thesis that this happens only in the sense that it sustains what already exists.

ICT in rural areas: how can it be effective in developing the rural economy?

For ICT to be effective we need an existing sense of community and the conditions for successful entrepreneurial activity must also be in place. It is only then that rural entrepreneurs will perceive ICT as a means of developing their own business and contributing to their local economy and community. That is, where there is already a common commercial link ICT can be used locally to overcome isolation and also to market the product further afield – even abroad. This may best be demonstrated using a case study in farm tourism in a remote rural area of England. Indeed the area is designated Objective 5b making it eligible for financial assistance as an area at an economic disadvantage due to over-dependence on agriculture, a declining industry.

Case Study

Peak District Farm Holidays (PDFH, 1999) is an association of 35 farmers offering accommodation in the Peak District and Staffordshire Moorlands and collaboratively organises marketing and training for its members. It was founded in 1977, the first of a national network of Farm Holiday Groups. Recently the group benefited from a European Union (EU) grant, through the European Agricultural Guidance and Guarantee Fund

(EAGGF), for a business development project. This included an IT package enabling members to communicate by e-mail and develop a website. It allows the group members to stay in daily contact while living in a relatively remote area of rural England. It is used daily and is particularly useful in providing up to date information on vacancies, especially in the self-catering side of the business. The group use the program to advertise world wide and so significantly increase the scope of their business. More and more bookings now come through the 'Net'. It also includes links to other websites giving tourists information about other activities in the area to enjoy during their farm holiday, offering them a complete package. This, of course, has a multiplier effect for the local economy as other businesses, especially those advertised in their brochure or on their web-site, gain extra business. It is interesting to note that the grant, which has allowed them to increase their non-farm-but-on-farm enterprises at a time of falling farm incomes, came through the agriculture budget of the EU, showing the switch away from output based subsidies to encouraging market-orientated rural business. The Chairwoman of the group commented that without this form of diversification and the use of ICT, the farms would be going through increasingly hard times.

The Development of Community Self-awareness

In the western world static food consumption and rising productivity have led to falling in farm incomes. The desire amongst the farming community for lifestyles and incomes comparable with those enjoyed by their urban counterparts (especially other small businessmen), has led to a significant out-migration of farm labour. It should be fairly obvious, both from consideration of human behaviour and from the historical development of farming in North America and North West Europe, that ultimately out-migration of farm labour ceases to be a viable strategic adjustment. After this, farming families who wish to remain in the countryside as successful economic producers must engage with the supply of those services to consumers which enjoy significant positive income elasticity of demand. A sector which may satisfy these conditions is exemplified by tourism (reputedly the fastest-growing sector of the world economy) and in particular rural tourism.

There are two aspects to this prospect which are concerned with community development and the farming population. The most general is the role of community self-awareness in fostering successful local, regional or national tourism. At the micro or individual business level, community self-awareness generates positive externalities in as much as this provides the encouragement (welcoming and assisting) for holidaymakers to enjoy local attractions. It also underpins the notion that encouraging local tourism has an exhibitionistic element in that the indigenous population expresses a willingness to allow itself to be, collectively and/or individually, observed and mingled with as a source of enjoyment for other people. This may require local (self-) consciousness raising such as has been practised in some parts of England (e.g. the Stour river project in Dorset) (Clifford, 1999).

Secondly, there is the location-specific: regional landscape distinctiveness conferred by the nature, pattern and extent of agriculture. Farming and the landscape are indistinguishably intertwined in most areas of a country like England (e.g. the Peak District). Farmers collaborating in PDFH are branding their holiday business by the very local landscape which their farms create.

In both aspects, the PDFH group may be seen as exemplary in their demonstration of developing a sense of community on which existence the use of ICT is made possible.

In development of local community solidarity there are two aspects which emerge:

- the use of ICT to reinforce and develop the group;
- the benefits to farm tourism and local tourism in general to be gained by enhancing local community self-awareness particularly with respect to the relationship between farming and the landscape.

Clearly, when considering the requirements for entrepreneurship laid out by Aldrich and Zimmer (1986) the farmers involved in PDFH are motivated entrepreneurs, motivated if nothing else by falling farm incomes and the need to use the resources to which they have access to generate non-farm-but-on-farm income. These resources include farm house and, often farm cottage, accommodation. In the latter case these are often made vacant as farm mechanisation means fewer hired workers are employed. There may even be redundant farm buildings to convert for holiday accommodation. Rising disposable incomes in urban areas has meant the growth of a niche market which these entrepreneurs could occupy: increased spending on leisure and tourism encouraging, in particular, short breaks in country areas. With respect to linkages, the farming community has a well developed sense of identity and, through membership of such groups as the National Farmers Union and the Family Farms Association, there pre-existed relationships out of which a specially-focussed group could evolve. However, it was only when the group was already set up and successful that ICT was perceived as a useful tool to expand the business and improve communications.

Lessons to be drawn

ICT is a useful adjunct to but not a precursor of economic development. Community development is required before ICT's role in sustaining community based initiatives can be effectively realised. Community self-awareness and landscape-awareness are increasingly important in support of tourism-led rural economic development. These elements are location-specific rather than generic; requiring self-awareness based on education rather than simulation based on training.

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Issues In Shared Schools In Mixed Aboriginal & Non-Aboriginal School Systems

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Abstract

Canada's public educational programs are essential public goods resources. In order for children to benefit parents must cooperate in efforts to support and enhance their children's education. In today's multicultural communities we see an increasingly complex mix of parent's expectations, cultural beliefs and the values and assumptions of educational systems. Differing cultural and class backgrounds impact not only parent's worldview but also their specific goals for children. Educators' note the increasing focus and concern of parents in ensuring their children are prepared in terms of the embodied capitol (knowledge, values and skills) required for success in today's competitive labor markets. In this vein, a trend for academically advantaged parents to try to influence public school systems on behalf of their own children has been noted. For aboriginal parents the situation is complex and impacted by both the historical context as well as evolving cultural expectations. Parents wrestle with the appropriate role of traditional aboriginal knowledge and cultural identity in public education as well as issues related to continuing assimilationist impacts of the school experience. This presentation will focus on this issue as experienced in a small Northwest Territories community made up of aboriginal and non-aboriginal residents. Cross cultural differences between parents' priorities for their children's education and the impact of these differing agendas appear at times to be experienced as obstacles to cooperative efforts despite common concern for their children's success. The proposed course of research to be carried out by the presenter to investigate this experience further will be outlined.

"I went to that school as a boy and I remember the nuns and how strict they were. Sister used to tell me I was stupid and would never learn anything when I tried to ask for help. It hurts me to go into that building but I do because I have three children in that school and I want them to have a better experience than I did. I want them to be able to learn what they need to get good jobs, but I also want them to be proud of who they are. I want them to know about their own culture so they won't feel ashamed like I did."

"This school worries too much about listening to the native parents who want more cultural activities. That's all well and good for once in a while but in the mean time our kids are getting further and further behind kids in southern schools. We need to focus on the three R's first, then if there's extra time, do cultural activities. If we don't they'll never be ready for University. I'm so worried I'm thinking about taking my kids out and doing home schooling instead."

Introduction

As my oldest child prepared to enter the school system in the small Northwest Territories community where I lived for fourteen years, I experienced the anticipation that most parents do. How would my child fit in? Would the school's goals be consistent with what I wanted for him? However, I was also aware of other voices, voices of concern amongst community parents about the school, its curricula and its teaching methods. The nature of these concerns appeared to reflect the differing views of the communities Dene, Metis and Non-aboriginal parents. Aboriginal parents, reflecting on their own often negative educational experiences, appeared to be concerned about the impact of a lack of culturally relevant programming on their children's development. Non-aboriginal parents raised questions regarding the standards and the quality of the education delivered in this Northwest Territories school as compared to those in southern Canada.

As I continued my introduction to this milieu it became apparent that cross-cultural differences, lying below the surface in most of the day-to-day interactions in our community, were heightened in the context of parent's hopes for their children. In this case attempts for parents to work cooperatively on efforts to enhance their children's education led to frequent conflict, eventually resulting in the formation of two separate parent advisory groups. I believe what I saw in this community is a particularly complex representation of the sometimes competing needs of parents as they focus on their children's educational success in today's climate of decreasing educational funding. Increasing numbers of parents are demanding that educational systems be more responsive to the learning and cultural needs of all children.

Issues in Aboriginal Education

Canada's public educational programs are an essential public goods resource. In today's multicultural communities we see an increasingly complex mix of parent's expectations, cultural beliefs and the values and assumptions of educational systems. As parents we are all interested in our children's future and in their success as adults. However, differing cultural and class backgrounds have been noted to impact not only parent's worldview, but also their specific goals for their children (Harkness, 1996; LeVine, 1980; LeVine & White,1987; Small, 1998).

For aboriginal parents the situation is complex and impacted by both the historical context as well as by evolving cultural expectations. Parents wrestle with the role of schools in promoting traditional aboriginal knowledge and cultural identity. This debate is particularly relevant given the continuing impact of past colonizing educational experiences such as experienced at residential schools, as well as the continuing assimilationist effects of attending public schools (Barman, 1996). Aboriginal people have a long history of experiences with educational programs that were aimed primarily at assimilation rather than empowerment. Even if intentions were benign or at least not a part of active awareness, the assumptions underlying western curricula and teaching methods have typically negated the knowledge of aboriginal peoples and of its importance. This history continues to haunt interaction with current educational systems (Crey & Fournier, 1997; Royal Commission, 1997). It is believed that the impact of these experiences have contributed to and continue to contribute to the loss of a healthy cultural identity and to the maintenance of cultural values inherent in essential culturally based skills (Crey & Fournier, 1997: Royal Commission, 1997).

Historically, the introduction of western education in aboriginal communities has meant the provision of education based on western learning practices and objectives as well as resistance to the use of traditional aboriginal learning methods. In most public schools the emphasis remains on achieving the tools for success deemed necessary in the dominant cultural context. Yet for aboriginal and many other minority group parents this approach leads to the loss of the traditional cultural "tool kit". This loss appears to, in effect, decrease rather than increase the likelihood of educational success. Aboriginal parents wrestle with how to achieve healthy, culturally aware young people who are also ready for employment in a variety of settings. Maintenance of traditional cultural values, identity and learning tools enhances a strong sense of cultural efficacy and identity (Ruttan, 1999). I suggest that from this point of strength, tools from the dominant culture can then be added without loss of identity.

Changing Educational Contexts

Currently educators note the increasing focus of parents in ensuring their children are prepared in terms of the embodied capitol (knowledge, values, skills) required for success in today's competitive labor markets (Kaplan, 1996). In this vein, a trend for academically advantaged parents to try to influence public school systems on behalf of their own children has been noted (Fried,1998; Kohn, 1998; Kropp & Hudson, 1995). These parents seem to be concerned that their children not only develop necessary skills but also stand out from the crowd, which is perceived as necessary for entry into post secondary programs. It has also been suggested that as demographic trends change and family size decreases, parents are placing more emphasis on the success of their smaller number of children (Borgerhoff-Mulder, 1998; Kaplan, 1996; Lancaster, 1987; Boyd & Richerson, 1999).

Concern has been raised that given this trend, parents of less academically and socially advantaged children may not realize what is at stake or how their children may be left further behind (Fried, 1998; Kohn, 1998; Kropp & Hudson, 1995; Lareau, 1989) as parents "negotiate their self interest in the commons" (Bauch et al, 1998, p.81). In the case of aboriginal parents this issue may be further compounded when traditional values and communication styles encourage a non-interference or non-confrontational style in which more subtle communication cues are expected to be understood as expressive of the individual's wishes and desires. (Brant, 1990; Hart, 1990; Ross, 1992). Communication misunderstandings, cultural differences in expectations, as well as the residual impacts of residential school experiences (Barman, 1996) have left many aboriginal parents wondering whether their goals can be met within existing school systems and in response many bands have developed their own educational programs (Dempsey, 1993). However, it has been noted that successful culturally relevant programs must come from an aboriginal perspective and not simply replace existing staff with aboriginal staff trained only in western methods (Hookimaw-Witt, 1997).

Cooperation in Cross-Cultural Contexts

Canada is a multicultural society with an increasingly diverse population. First Nations peoples, native and foreign-born Canadians of a variety of ethnic backgrounds live and work in situations where interaction occurs on a daily basis. We live in communities made up of families. These families must interact in cooperative ways in order to respond to the varying needs of family members. This is particularly true for services for children who attend school and are involved in both formal and informal recreational activities together. Children's success in these activities and the potential for receiving equitable benefits from public goods resources (such as schools) are enhanced when parents cooperate in supporting programs.

In communities such as the one described earlier, cross-cultural miscommunication regarding what constitutes cooperative strategies can be all too frequent. Many non-aboriginal parents, new to the community, try to cooperate by getting involved, helping with the school as parent council members or classroom volunteers. However, this can be perceived by aboriginal northerners as disrespectful and in fact uncooperative. Rather than observing and learning first-hand and then joining with other parents, these individual actions can be seen as rude and self-serving. When non-aboriginal parents notice this reaction they often feel their attempts to cooperate have been rebuffed and instead opt for seeking the best options for their own child or cooperate only in small groups of similar parents.

Schools as a Shared Public Goods Resource

Public schools, based on tax-based revenues, constitute a collective resource provided by government. For many aboriginal children education may also be a treaty right with implications that are not readily understood by parents or educators in the context of shared local school systems. Public schools are meant to provide equal access and opportunity for all children. However, given the issues discussed above, while access to public education may be equal, the accessibility and suitability of the education offered and of the teaching methods used may not be.

In our day-to-day lives, many of us tend to forget the impact of this pooling of interests and that all interests are not identical. Remarkable for the degree of cooperation that does exist, nevertheless competition to get the most benefit per child of this shared resource has an impact. This competition is heightened in times of scarce resources and increasing demands such as we are currently experiencing. Parents from varying cultural, class and ethnic groups may use a variety of strategies to obtain preferential benefits for their own children in this collective or in effect common pool resource. While we continue the rhetoric of collective good and equal opportunity, individual strategies based on class, status or ethnicity can be observed and often prove to be successful strategies.

An alternative way of understanding this issue may be provided by referring to game theory, which has proved useful in the understanding of cooperation in the context of shared resources. As noted by Ostrom, prisoners in the classic prisoner's dilemma scenario are placed in separate cells, they cannot cooperate (Ostrom, 1990). Similarly parents who have differing cultural norms, communication and decision making styles often cannot cooperate easily. Temptation to free ride or act individually increases if class, status, or ethnicity increases the likelihood of obtaining benefits for acting alone or is likely to result in a greater payoff than by acting jointly with others.

In our everyday world much of the monitoring of these dilemmas is mediated by shared norms that help us guess what the reaction of others is likely to be (Axelrod, 1997, Ostrom, 1990). These shared norms or as termed by Ostrom, "social capitol" help to reduce the likelihood of the use of non-normative strategies such as opportunistic individual action. Thus, while shared norms cannot reduce opportunistic behavior to zero, they do help us to make decisions regarding the sharing of collective resources with others. However, in the context of varying cultural norms and expectations, the effectiveness of this reliance on norms is weakened. Cross-cultural interactions are frequently complicated by not knowing or understanding the norms of others. This may lead individuals to rely on assumptions based on past experience, on communication misunderstandings or on stereotypes, which can only add to already existing barriers.

While this metaphor is interesting and I believe is worth pursuing, it is presented only in it's simplest form here. As well, it is not entirely sufficient in and of itself, especially in circumstances with complex social and historical factors such as experienced by aboriginal people. Nevertheless, this model does offer us an additional way of looking at and perhaps resolving this dilemma. As noted by Ostrum, while prisoners in a prisoner's dilemma can't change the constraints imposed on them, we are not prisoner's, we are capable of addressing these constraints and enhancing problem solving (Ostom, 1990).

Conclusion

Education and culture have been included as two of the twelve determinants of health by Health Canada. It has been noted by Dr. Fraser Mustard that health status improves with education, as does income (Standing Committee, 1995). Dr. Mustard also noted the need to work with aboriginal communities to support parents, educational programs and the health of children. Higher education levels are also associated with increased employment success and a greater sense of personal efficacy and control, as well as a higher level of overall health.

The role of cultural relevance in enhancing a sense of efficacy based on cultural identity or cultural efficacy (Ruttan, 1999) is seen by many aboriginal groups as highly important. At the same time aboriginal parents, as are all parents, are increasingly aware of the need for a high quality of development in the embodied capital (knowledge, values, skills) needed in order to take advantage of future employment opportunities. Thus for adult success education is increasingly seen by both aboriginal parents and non-aboriginal parents as a vehicle to the development of a healthy identity and of the knowledge and skills required. Nevertheless, in many mixed aboriginal and non-aboriginal school systems the sharing of increasingly scarce collective resources given differing norms and goals can result in misunderstandings and the failure to meet educational needs as identified by either group. As aboriginal bands settle land claims they may choose to run their own schools leaving less resources for public schools in an already diminished pot. It will be interesting to see if this changes the dynamic or payoffs for community wide cooperation in mixed communities. Nevertheless, clarification and education regarding the nature of this dilemma in terms of appropriate educational practices in shared resource contexts may encourage the development of new strategies.

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THE LEARNING CIRCLE: A New Model Of BSW Education For Alberta's Rural, Remote, And Aboriginal Communities

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Abstract

According to the University of Calgary Calendar, the BSW program prepares students for entry-level general social work practice by providing opportunities for students to acquire sufficient knowledge, values, and skills to enable them to maintain a professional standard of practice. The University of Calgary has been graduating social work students for more than 30 years. At the BSW level, students have been able to study on the Calgary campus or at Divisions located in Edmonton and Lethbridge. In spite of a provincial mandate for undergraduate social work education in the province of Alberta, the Faculty of Social Work has not had the resources to make its undergraduate social work program available on an ongoing basis outside of these three urban locations.

Recognizing the importance of access to a BSW education for Albertans living in rural, remote, and Aboriginal communities, a consortium of interest groups developed a proposal in 1998 to apply for Access funding from the provincial government. Entitled the *Alberta Social Work Degree Accessibility Plan: Virtual Learning Circles* (BSW Access Proposal), this document reflected the collaborative work of many stakeholder groups including the University of Calgary, the Northern BSW Stakeholders' Council (representatives from Children's Services Regions, Metis settlements, Metis zones, First Nations and tribal organizations, northern regions of Family & Social Services, private northern service agencies, post-secondary institutions under the Alberta North umbrella), and FNAHEC (First Nations Adult & Higher Education Consortium, with member colleges and education boards from the Treaty 6 and Treaty 7 areas plus the North Peace Tribal Council).

The need for social work education outside of Calgary, Edmonton, and Lethbridge was not a new concept. Communities, agencies, and institutions in rural and remote regions had expressed their needs over a period of many years, as had the Alberta Association of Registered Social Workers. During the 1990's, the Faculty of Social Work had conducted three separate studies examining feasibility and program models for distance education in social work. None of these earlier efforts had been successful in securing funding to develop such a program. Given the apparent high demand, the collaborative nature of this proposal involving many community stakeholder groups, and the provincial government's recent interest in access to higher education in rural regions (expressed through Access Funding Envelopes), the BSW Access Proposal was approved for funding in late February 1999.

BSW Access Proposal Principles

Several principles for a re-designed BSW curriculum were declared in the BSW Access Proposal. Specific guidelines called for "innovative course content" (p. 9) that will be "culturally and geographically relevant" (p. 6). BSW curriculum content and delivery modes were to be "adapted" (p. 6) and "re-designed" (p. 10) to be "sensitive to First Nations and Metis peoples" (p. 6) and "aligned with traditional philosophies and knowledge systems" (p. 11). Course delivery methods were to be "flexible in time, place, and mode" (p. 5), with course scheduling "based on a flexible entry model and home community placements" (p. 11). This new program was to feature a "mutually designed infrastructure" to integrate "the best of distance education technology with face-to-face professor /student and student/student educational opportunities" (p. 2).

At the same time as all these innovative directions were prescribed for curriculum content and delivery, the BSW Access Proposal also made very clear that the new program had to be "of the same quality as the programs currently delivered on-site by the Faculty," and must lead to the "University of Calgary accredited social work degree" which "adheres to national accreditation standards" (p. 1). This two-pronged set of expectations presented a real challenge. The new model was to be recognizable as the accredited University of Calgary BSW degree program while at the same time featuring curriculum and delivery modes that were re-designed, innovative, flexible, and culturally sensitive.

BSW Access Division Team

Funding for the BSW Access Proposal was announced in late February 1999. The Faculty of Social Work reviewed the tasks and determined that the proposed Access activities would best be carried out by creating a new Division, parallel in structure and reporting relationships to the existing Edmonton or Lethbridge Divisions. On April 1, 1999, the Faculty assigned a senior faculty member with relevant experience as Division Head of the new BSW Access Division for the development and implementation work (a contribution from Faculty funds not Access funds). Recruitment efforts began to fill the new positions for the Access Division team.

Recruitment for the BSW Access faculty positions was a lengthy and complex process. For the first time in the University's history, the Selection Committee included

Aboriginal persons from community stakeholder groups as full voting members. An Elder from Grande Prairie and an Education Counsellor from Old Sun College participated in the Selection Committee along with representatives from the Faculty of Social Work and an Aboriginal faculty member from Sociology. Some 35 strong applications were received from across the country and several rounds of interviews and presentations were conducted. The Selection Committee spent over 50 hours in May and June involved with interviews and meetings before specific offers were made.

The resulting Access Division Team is well balanced in terms of gender and cultural heritage: one First Nations woman, one Metis woman, two non-Native males; all with extensive related experience and all with a PhD degree or in the process of completing a doctorate. More detailed profiles of the Access Division team members can be found in Appendix I. Newly recruited faculty members had to disengage from academic and employment commitments elsewhere before joining the Access project, however, and this meant that a full Access Division team was not actually in place until mid-summer 1999.

Curriculum Design Process

In August of 1999, the new BSW Access Team developed a draft model for a re-designed curriculum to meet the various requirements set forth in the original BSW Access Proposal. Called the Learning Circle, the draft model was taken to various stakeholder groups across the province for consideration and discussion at open meetings in early and mid-September. Through this community collaboration process, modifications and revisions were identified before the model was taken to the University for program approval in late September. Changes were incorporated to meet an October 1 deadline for inclusion of new courses in the University Calendar. In other words, a mutually designed and approved BSW Access Program was "official" by October with approved course descriptions and numbers for students to register for credit. Once approved for the University Calendar, the new version of the BSW program through the Access Division was promoted to potential applicants in the communities through October and November 1999 with full information concerning the new course offerings, course numbers, degree requirements, program duration, costs, and registration procedures.

The Learning Circle

Several major adaptations to the Calgary BSW curriculum and structure were required to comply with the expectations of the BSW Access Proposal. Overall program structure was altered from the conventional sequential format (involving core pre-requisites and advanced courses) to a predominantly non-hierarchical structure – the "Learning Circle."

Core content was organized into four main "theme" areas considered important for practice in rural, remote, and aboriginal communities. These four theme areas are:

- Generalist Practice in Context
- Communications & Information
- Diversity & Oppression
- Social Work Methods

These four theme areas comprise the outer ring of the Learning Circle. Students also take three social work option courses then move on to the practicum experience at the centre of the Learning Circle. Following is a diagram of the Learning Circle model (with the half-course equivalent value of the various courses indicated in parentheses following the course name [Editor's note: The Learning Circle appears at the conclusion of this paper).

Students can register with the BSW Access Division to begin in either Fall or Winter Session, entering the Learning Circle according to the theme area being delivered at that time in their location. Social work option courses may be taken at any time in the program, but specific option offerings are made available in block format during Spring/Summer Session. The final component of the Learning Circle model is the practicum. Following the direction of the BSW Access Proposal, students can take their practicum placement in their own community or region with a flexible schedule to be negotiated individually between the student, local agency, and the faculty. Normally, the four theme courses, related projects, and option courses would be completed before an Access student begins practicum.

Each theme course includes core curricula which has been specifically adapted for application in rural, remote and aboriginal contexts:

- The Generalist Practice in Context Theme Course examines knowledge, values, and skills pertaining to the practice of generalist social work practice with particular attention to practice issues and alternative approaches in the context of rural, remote, and Aboriginal communities.
- The Communication and Information Theme Course provides instruction in effective communication and information management practices. Included in this theme course are modules relating to cross-cultural communication, interviewing, report writing, research methods, and the use of technology in social work research and practice. Particular attention is paid to the issues of influence and informed decision-making in non-urban settings.
- The Diversity and Oppression Theme Course addresses issues of diversity, colonization, and intergroup relations. Included in this theme course are

modules relating to decolonization, social policy, human growth and development, and program evaluation with an emphasis on power issues affecting outlying communities.

- The Social Work Methods Theme Course offers specific instruction in intervention approaches and includes modules dealing with casework, groupwork, organizational change and practice in rural, remote and Aboriginal communities.

Each theme course includes modules focused on 'Local Applications' where local resource persons present information and lead discussion with students in an attempt to connect course content with current practice and policy issues in the local region.

Accompanying each theme course is a Portfolio Project which challenges the student to integrate his or her professional and lived experience (including learning from the theme course) into a reflective project involving supported independent study. For example, in the Generalist Practice in Context Portfolio Project students are asked to develop a portfolio that demonstrates their own developing model of social work practice. In the Diversity and Oppression Portfolio Project students are asked to prepare and present a major project which assesses local policies and programs with respect to diversity issues and colonial assumptions.

In consideration of the often limited number of agencies and qualified supervisors available in many rural, remote and Aboriginal communities, the Access Division requires that students complete one practicum placement (rather than the conventional two) during their program of studies. That one placement, however, must meet the requirements specified in the accreditation standards of the Canadian Association of Schools of Social Work including the prescribed number of hours. Accompanying the practicum is an Integrative Practice Seminar that promotes the integration of theory and practice within the local region practicum.

Delivery of a full theme course features a series of eight 9-hour modules. Course modules have been scheduled bi-weekly to accommodate the employment status of most Access students, and to allow sufficient time for students to complete course readings and short assignments associated with each module. Some communities scheduled modules for Thursday night and all day Friday; others preferred Friday night and all day Saturday.

The BSW Access Proposal called for delivery methods that would integrate distance education technology with face-to-face instruction. Based on the feedback from our community meetings and discussions with other distance educators, the BSW Access Division made a decision to gradually integrate distance education technology into the delivery of our courses. Student and community reaction to our first course offerings are crucial to the credibility and success of the Learning Circle model at the community level. (We have been told that Elders in some communities encouraged their "best and most resilient" students to sign up for these first courses; others will be encouraged to apply later if the first experience is good.) Through our community meetings and some initial trials with video-conferencing, Access Division members learned that students clearly favoured face-to-face instruction. Cognizant of the crucial need for relationship building in the early stages of our program, the Access Division decided to first establish our presence and develop relationships with students at our various program sites. As students progress through the program, we can incorporate relevant technology in the Learning Circle model to support our instruction, reduce costs, and further increase access.

Sites

Following the community meetings in the fall of 1999, a total of 107 persons applied to the BSW Access Division. Of this pool, 83 were eligible either for full admission to the Faculty (36 students) or to commence classes with unclassified status (47students) while completing their remaining general education courses required for admission. Based on an analysis of the distribution of applicants, the BSW Access Division commenced instruction in January 2000 at six locations across the province (Standoff, Hobbema, Slave Lake, Grande Prairie, Peace River, and High Level). Some 73 students are currently taking courses at those sites.

Based on the profile of applicants, BSW Access Division delivery sites were confirmed in Standoff, Hobbema, Slave Lake, Grande Prairie, Peace River and High Level. Our southern most site is located at Red Crow College near Standoff Alberta on the Blood Reserve with 14 students this term. Dr. Betty Bastien is the Access Division faculty member responsible for site coordination and liaison with students at Red Crow College. Further north is our site located at Maskwachees Cultural College in Hobbema with 13 students this term. Jeannine Carriere is the Access Division faculty member responsible for site coordination and liaison at that location. North of Edmonton is our Slave Lake site at Northern Lakes College with 12 students. Ralph Bodor is the Access Division faculty member responsible for liaison and Anne Marie McLaughlin is responsible for site coordination in Slave Lake. Further west are the BSW Access Division sites in Peace River and Grande Prairie. Our program site in Grande Prairie is located at Grande Prairie Regional College with 14 students this term. Fairview College hosts our Peace River site with 9 students. Site coordinators in Grande Prairie and Peace River are Lana Wells and Joan Wahl respectively. Or northern most site is located at the North Peace Tribal Council near High Level with 9 students. Our site coordinator in High Level is Kerri Cardinal. William Pelech is the Access Division faculty member responsible for liaison in Peace River, Grande Prairie and High Level.

Lessons Learned

The Faculty of Social Work has learned many important lessons from the early stages of the Learning Circle model and the BSW Access Division. We have attempted here to identify some of the major lessons that may be valuable to others contemplating or currently involved with outreach social work education.

Lesson #1: The Expanded Meaning of "Access"

In many discussions regarding post-secondary education, "improving access" has meant simply increasing the number of students registered in a particular program. The outcome measure of access for many programs is a simple matter of enrolment numbers. From this perspective, the BSW Access funding could have been targeted solely towards increasing the number of BSW students from rural, remote, and Aboriginal communities taking the mainstream curriculum. Clearly, increased enrolment was a goal, but the BSW Access Proposal that was approved and funded identified another crucial component of "access" with regard to social work curriculum.

Some students from rural, remote, and Aboriginal communities who had attended our urban campus locations (Calgary, Edmonton, and Lethbridge) for their BSW education had complained that the curriculum was not "accessible" in that it was rooted in urban Western European assumptions that may not be compatible with the perception of issues and helping practices in non-urban settings. From this cultural perspective, relevance becomes a major component of accessibility. This notion of cultural relevance as a component of access demands much more from an Access program than simply putting students in seats.

Prior to any effective recruitment of students, the Access Division had to develop a whole new BSW program model (the Learning Circle) relevant for rural, remote, and Aboriginal communities. This expanded notion of "access" can be easily misunderstood or overlooked by funders and decision-makers who are only interested in the bottom-line of students in seats.

Lesson #2: Realistic Time Frames

The original BSW Access Proposal had assumed a start-up date of January 1, 1999. The first phase of development was to be a 2-month period (Jan-Feb) during which a Distance Planning Circle would conduct an environmental scan and put together a development plan. The second phase (Mar-Apr-May) was for curriculum development and partnership agreements. The third phase (June-July-Aug) involved professional preparation of the redesigned curriculum materials. Courses then were to begin in September 1999 with an expectation of 50 students.

This original schedule did not account for the time required for recruitment of a new faculty team for the Access Division. The BSW Access Proposal was not funded until late February 1999 and a new Access Division team was not in place until mid-summer. The Learning Circle curriculum model was developed by the Access Team in the month of August, then had to be taken to the Faculty, the Alberta Association of Registered Social Workers, and the various community stakeholder groups for feedback, revisions, and approval. After this came the complex process of seeking approval for the new courses and requirements from multiple levels of University administration. BSW Access course offerings in September 1999, as envisioned in the original Proposal, were simply not possible unless we had completely ignored the mandate to develop new and relevant curriculum with the involvement of the stakeholder groups. Endorsed by the University and all community stakeholder groups, a decision was made in September 1999 to delay initial BSW Access course offerings until January 2000.

Lesson #3: "2+2" Does Not Always Equal "2+2"

In our community meetings and discussions with some colleges in the fall of 1999, we discovered that the catch-phrase "2+2" can have two very different meanings in different educational contexts. The resulting confusion directly affected our recruitment process and led to a sense of frustration on the part of some potential students as well as their employers and communities.

Within the university social work education community, most BSW degrees are achieved through four-year undergraduate programs that begin with two years of general arts & science courses followed by two years of social work courses. The University of Calgary BSW program follows this model, commonly described as "2+2" to indicate the two full years of general studies followed by two full years of social work. In some college contexts, however, the phrase "2+2" denotes a program whereby a student completes a 2-year college diploma program followed by 2 years of university to achieve the undergraduate degree in that discipline. Some stakeholders apparently believed this to be the case for the BSW Access model. They thought that someone with a social work diploma could move directly into year 3 of the BSW program.

Throughout the community stakeholder meetings and the proposal development stage for the BSW Access model, the Faculty of Social Work thought it was being very clear that the BSW via Access was still a "2+2" degree. Access students would be expected to have completed two full years of general studies courses or equivalent to be eligible for admission to years 3 and 4 of the BSW offered through the Access Division. It appears that some community stakeholders supported our "2+2" model assuming that diploma graduates would move directly into year 3 of the

BSW. Some were disappointed to discover that additional arts courses had to be completed in order to be eligible for admission into the BSW program.

Resolution of this "2+2" misunderstanding has been attempted in several ways. Some diploma graduates are concentrating on completing their required arts courses before applying to the BSW Access Division at a later date. Others, with five or less arts courses remaining to complete, have been admitted to the first BSW Access offerings as unclassified students who will continue working on their arts courses while taking their social work courses. We expect that these students will take longer than 2 full years to complete their BSW degree requirements through the Access Division.

Lesson #4: "Full-time" is a Relative Concept

In some discussions, "full-time" refers to a full load of ten half-course equivalents (HCE's) per year or 5 HCE's per term. The BSW Access Proposal budget made several references to "full-time" students. That same Proposal, however, also directed that the schedule of Access courses should be flexible and responsive to community needs and requirements. When the Access Division team travelled to communities to discuss appropriate course loads, we found something very different from any assumed urban campus notion of "full-time." Many potential BSW Access students were attracted to this model because they were not able to leave family, community, and employment for an extended period of time. It follows that most could not assume a load of 5 HCE's per term and continue with employment and family/community commitments. This situation is not only an individual student concern but a community issue as well. Consider a small community where 9 or 10 social workers with diplomas wish to take their BSW via Access. These people may be the backbone of the local social service network which would collapse if everyone left. Employers and outlying communities cannot afford to lose most or all of their resource workers to full-time study.

This was the message we heard loud and clear in the communities. A maximum of 3 HCE's per term would be workable. Offering 3 half-courses per term in any given site would allow the students to take either one or two or all three if they are able. Many are also working on remaining arts courses required for admission. In general, students taking 3 HCE's per term are considered "full-time" for funding purposes from their bands or tribal councils.

BSW Access students can also take up to three block elective courses offered in spring/summer term. In other words, an Access student can take 9 HCE's in a calendar year, but would be counted as only taking 3 on the enrolment figures for any one semester.

Future Directions - Workload and Future BSW Access Development

Fall 1999 was a very stressful time for the BSW Access Division Faculty members. Except for the Division Head, all were new to their University of Calgary faculty positions. Three are completing their own doctoral dissertations while working for the Access Division. This team developed an entire new curriculum model in the month of August. While this intense work is very rewarding, it is also demanding especially given the cross-cultural composition of our Team and our students. Much of the fall was spent on the road in community meetings, information sessions with potential students, and orientation sessions with actual students. In addition, the team worked to develop detailed Course Outlines and resources for the new courses to begin in January. Much effort was spent shepherding the new model through various stages of approval within the University and the communities. Our support staff person took on demanding roles as admissions coordinator and student advisor.

During this winter 2000 term, the Access Division team is delivering three totally new courses in six new sites ranging the length of the province. Much of the teaching is on weekends. Roundtrip travel to deliver a 9-hour course module can vary anywhere from 5 hours to 15 hours depending upon the site. At the same time, the Access Division faculty are trying to develop their spring/summer offerings plus the new course offerings for September.

We have learned in these first few months that we have overextended ourselves and there could be a danger of burnout. We tried to respond to stakeholder needs by offering courses in six sites this term, but that is a pace we cannot maintain. Some of our current sites will have new students added in the Fall 2000 term. We need to consolidate and develop these current sites, ensuring that we continue to offer a challenging and relevant curriculum. For the foreseeable future, it may be realistic to add no more than one new Access Division site per term.

Collaborative Development and the Planning Circle

The original BSW Access Proposal called for "extensive dialogue and joint decision making" in the development of the program. Suggestions were put forward for a structure to include "an overseeing Planning Circle," local Planning Circles, a Council of Elders, and a Curriculum Circle. Through "consensual Decision making," these groups were to be involved in "ongoing collaborative development of the program."

Although an important feature of the original vision, such a complex collaborative structure was not possible to implement prior to the first term BSW Access offerings. The new BSW Access Division team had only one month to develop an entirely new curriculum model to take to the communities, stakeholder groups, professional association, and University for approval. (Some other schools of social work have allocated 2-3 years for distance-delivery development of their current program content, let alone an entirely new curriculum model.) It could have taken most of the fall to set up the collaborative structure and there would have been no courses ready to go in January 2000.

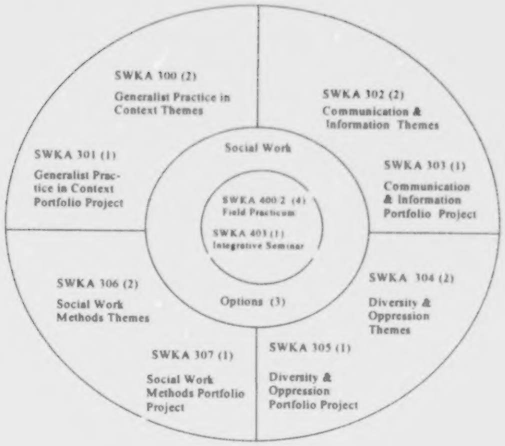
Certainly community stakeholder groups have been involved in the early stages of the BSW Access Division. They were represented on the Academic Selection Committee that hired the new faculty members. The team that was recruited includes First Nations, Metis, rural, and northern backgrounds The new course offerings feature modules devoted to "local applications" where Elders, healers, agency workers, and other community resource people are invited to class to help students connect the course material with local history, tradition, and issues. In this way, the BSW Access model is collaborative at the local region level, but work remains to be done on the larger Planning Circle concept.

Summary

Without the vision and creativity of those who assembled and supported the BSW Access Proposal, there would be no BSW Access Program today. Without the government's Access Funding, the Faculty of Social Work would still be unable to respond to the known demand for social work education in rural, remote, and Aboriginal communities across Alberta. The Access funding presented us with an opportunity and a responsibility. Through the Learning Circle model, we have worked to implement both aspects of "access" as it relates to social work education. With regard to content, we have developed and implemented a culturally relevant and accessible curriculum model that has been approved by the community stakeholder groups. With regard to enrolment numbers, our 80 students attending Winter 200 classes in six sites bring us very close in this first term to our targeted steady state.

One year ago, BSW Access was an unfunded vision. Six months ago, it was a formidable task faced by a team of brand new faculty members. Now it is a reality with some 73 students meeting with instructors in six Alberta communities ranging from High Level in the north to Standoff in the south.

THE LEARNING CIRCLE


SWKA 300 (2)
Generalist Practice in Context Themes
SWKA 302 (2)
Communication & Information Themes
SWKA 301 (1)
Generalist Practice in Context Portfolio Project
Social Work
SWKA 303 (1)
Communication & Information Portfolio Project
SWKA 400/2 (4)
Field Practicum
SWKA 403 (1)
Integrative Seminar
SWKA 306 (2)
Social Work Methods Themes
Options (3)
SWKA 304 (2)
Diversity & Oppression Themes
SWKA 307 (1)
Social Work Methods Portfolio Project
SWKA 305 (1)
Diversity & Oppression Portfolio Project

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Working Together To Promote Mental Health In Rural Areas

Alison Monk, England

Abstract

Members of rural communities throughout the industrialised world face continuous change and upheaval. In Europe the Common Agricultural Policy is about to undergo further radical reform, resulting in reduced subsidy levels and farm incomes in order to meet the requirements of the World Trade Organisation for trade liberalisation. The decline in farming fortunes has been accompanied by growing rates of rural stress and suicide, not only among farmers but their families and other professions (e.g., vets). If rural areas are to develop to sustain local communities, promoting rural mental health becomes very important and has received much attention from governments as well as national and international groups concerned with farmer welfare. However, in England and Wales, practical support has typically been provided locally. This paper considers the growth of farmer self-help and rural support networks and, with reference to the highly successful Shropshire Rural Stress Support Network, considers the way in which a diverse range of statutory and voluntary organisations have co-operated and networked to meet rural mental health needs. It demonstrates the way in which local initiatives can succeed in educating, informing and supporting local rural communities. The new millennium will see a further development as local groups expand into regional initiatives.

Pressures are growing on farmers throughout the western world and this has a knock-on effect for other members of the rural community dependent on farming for their livelihood: veterinary surgeons, agricultural merchants, local shops etc as well as farmers' wives and children. These pressures have resulted in rising levels of stress in rural areas, stemming from uncertainty about the future of farming and its financial viability. This is accompanied by increasing mental health problems, especially depression and in extreme cases suicide. Furthermore, prolonged stress can lead to physical and emotional illness. But the link between stress, illness, depression and suicide is not linear. It tends to result from a combination of factors and events so intervention and mediation can take place at any stage in the cycle. Through its policy document, *The Health of the Nation*, the UK government aims to reduce the rate of suicide by 15% by the year 2000 (from 11.0 per 100,000 population in 1990 to no more than 9.4) and reducing the suicide rate of the severely mentally ill by at least 33%. It has also addressed the specific issue of high and raising levels of farm suicide (Healy, 1998). Despite the governments' stated policy objectives, support for the rural community is typically provided at a local level and this grassroots action is the subject of this paper.

Rural Isolation

Although there is a growing belief in the UK that the differences between rural and urban areas are, in many cases, more perceived than real in terms of their needs and aspirations, there is little doubt that rural dwellers are disadvantaged in the degree of isolation they suffer. Research suggests that isolation affects rural communities in general, and farmers in particular, in several ways (Monk, 1999).

Geographical isolation means that the provision of health care services in general, and mental health care in particular, becomes an important issue as stress levels rise. They have little choice of General Practitioner (GP) and although this is improving as rural practices increase in size, with GPs combining and centralising resources evidence suggests that the distance one has to travel to a health facility is inversely correlated with utilization rate (Roderick1999). Secondly, there are perceived problems with confidentiality of GP consultations which is particularly important when seeking treatment for a mental health problems to which a stigma attached. Roderick suggests that the rural population has a more negative attitude to mental health than urban residents. So, if we combine a resistance to seek help with difficulties in accessing mental health care facilities that are close at a hand and confidential, they problem of alleviating stress and treating mental illness in rural areas becomes problematic.

Cultural and Social isolation mean that since, farmers tend to trust the judgement and advice of other farmers and agricultural workers, the change in the constituency of the rural population is likely to adds to their isolation and stress as their natural support structures in the rural community dwindle. This is exacerbated by the diminishing size of most farm workforces, leaving farmers alone at work with little time or opportunity to talk to others (Cornelius, 1996) and squeezed between the hard realities of their existence and the demands of incomers with their poor understanding of rural life and their complaints about smells and noise (Pugh, 1996).

Psychological isolation results from farmers' belief that that as provider for family and staff they must be strong and cope in adversity without complaint or showing emotion. It is generally believed that farmers do not cope particularly well or appropriately with stress and that, by upbringing and social conditioning, they are not good at seeking help. They create their own, self-imposed (psychological) isolation so they rarely approach mental health services because of the stigma and the disgrace of being seen not to be coping. Pride means the farming community resents interference from outside bodies. There is even anecdotal evidence that, distrusting health care professionals, many farmers prefer to consult the vet than the doctor.

Additional factors indicating a need for local support and co-ordination

A whole range of other statutory and voluntary agencies offer services in the UK (e.g., Citizens Advice Bureau [CAB], the Samaritans, Social Services). But, as well as being geographically remote, many are seen as being urban in nature and the providers unsympathetic to or unknowledgeable about farming and its difficulties. Some agencies are often unaware of the particular problems facing farmers. Even when they are aware of and concerned they face difficulties in connecting with rural people and appearing relevant. So, isolation is a major cause of rural and stress also affects the individual's ability to access help. It here that the many farmers support groups that have sprung up in rural areas have a vital role to play in supporting, enabling, co-ordinating and networking.

Networking trans-nationally

Stress affects farmers throughout the European Union and the European Network for Farmers SOS (ENFSOS), is an umbrella organisation co-ordinating rural stress activities. The European Parliament introduced a budget to support the work, with farming families in difficulties, already being done in other EU countries. The Farm Crisis Network (FCN) in the UK had close links with groups in the other countries and came together to negotiate use of the budget. The work of the UK organisations Rural Stress Information Network (RSIN), FCN and Shropshire Rural Stress Support Network (SRSSN) has already been supported through this money. ENFSOS also exists to encourage mutual learning and development, sharing knowledge and practice, and raising awareness.

Networking nationally

Within the UK three main organisations work together to address the problem of rural stress. The Rural Stress Information Network (RSIN) has three objectives:

- to be an authoritative source of information and advice
- to encourage the development of practical solutions for rural people feeling distressed or suicidal
- to be a source of information and causes and extent of rural stress

It holds a comprehensive database of work, practical and research, undertaken in the UK and much of that abroad. It assists the inception, growth and development of County Rural Initiatives (CRI's) providing information, support and examples of best practice as well as publicity. RSIN also assists in training and facilitating conferences and seminars on topic related to rural stress and produces a newsletter which is used by CRI's to raise awareness in their own areas as part of local publicity campaigns. They also offer a web-site facility where interested parties can post and access information.

The Institute of Rural Health (IRH), a centre of excellence in rural health, has three objectives:

- co-ordinating research, information gathering and dissemination
- education and continuing professional development of rural health care professionals
- establishment of partnerships with academic institutions, health authorities etc

It also networks to gain from others' experience. For example, RSIN and IRH are jointly managing a Project Officer, funded through the National Lottery, to engage in networking and raising awareness in Powys, a Welsh county heavily reliant on agriculture for employment and income. The RSIN and IRH, in networking with other voluntary and statutory groups educate them about the nature of rural problems and communities, so improving the services they can offer.

The Farm Crisis Network (FCN), a specialist arm of the Churches, operates under the umbrella of the RSIN. FCN provides a confidential phone service offering callers a contact with fellow farming people to talk to. They befriend, rather than give advice, and through a prophylactic approach help distressed farmers consider their options, hoping to avert individual crises.

Other national groups who network through their agricultural or "rural arms" Royal Agricultural Benevolent Institution (RABI) is the oldest of the organisations concerned with the welfare of farming (founded 1860). Their main work is with retired and disabled farmers and their dependants but assistance has always been available to the working farmer as well, in times of hardship although this is limited to help with domestic expenses and they also provide advice on claiming state benefits. Their work has increased significantly in response to the farming crisis of the 1990's and complements that of the rural stress initiatives.

RuralMinds is the rural arm of the mental health charity Mind. In partnership with the Department of Health, it aims to improve the mental health of people living in isolated rural area by developing more effective mental health services and providing information and training for rural mental health workers.

The Samaritans, realising that the rural community was high-risk group, viewing them as an urban organisation, decided to raise their profile. Their Rural Outreach programme has two arms: to reach as many people in rural areas with the direct message about the work of the Samaritans, stressing their confidentiality and availability, increasing publicity, and attending agricultural shows and auction markets, and to interest organisations in regular contact with the farming community to use the Samaritans as a resource by recommending them to making third party calls. A small card listing pointers to suicide and with the Samaritans phone number was disseminated and was the basis for the first CRI which as started in Hereford in 1992.

Networking locally: the growth of County Rural Initiatives (CRI's)

Although networking, information, co-ordination and resources etc exists at national and supra-national level, actual support for rural dwellers is typically provided at local level. Because each county has its own individual problems, needs and character, CRI's have tended to develop independently although transfer of experience and best practice is commonplace. Over 25 CRI's have been set up in England since the early 1990's with more planned. Usually started up by members of the rural clergy or fellow farmers, often with the active support of the county branch of the National Farmers Union (NFU), in practice, it doesn't matter who sets up and runs the groups as long as they co-operate and network with relevant organisations with emphasis on stress and suicide prevention.

CRI's also vary in the type and extent of help/support offered and in the early stages tend to start by issuing a card containing phone numbers where help can be obtained, similar to those initially distributed by the Samaritans. These cards may also contain some information about the causes and symptoms of stress and reassurance that the individual is not the only one suffering and need not feel responsible for the problems faced or embarrassed about being depressed or suicidal as it is not a sign of personal weakness, breaking down the taboos associated with mental illness that serve to isolate farmers. Experience shows that massive promotion of these cards is required to achieve success in reaching those who need help and friends and family close to them. Relaunches and press coverage help to raise and maintain the profile. They need to be distributed widely in places that farmers or their families visit: doctors surgeries, veterinary surgeries, village shops and pubs etc. This is becoming increasingly difficult as more of these village amenities close. Setting up a stand at local agricultural shows and auction markets is another way of raising awareness. The CRI's serve to overcome farmers' isolation, contacting them and informing them about the existence of available help. More recently CRI's have been widened to include all rural dwellers.

The next stage in a CRI's evolution varies but, typically, they increase the amount of practical help they give and begin to network with other voluntary and statutory organisations. Probably the best-developed and most successful group in England is the Shropshire Rural Stress Support Network (SRSSN) and its work demonstrates many of the ways in which CRI's develop and grow. It has a full-time Project Manager and part-time Project Assistant working in a dedicated office, manning a phone line for a minimum of 5 hours a day. Beneficiaries are offered friendship and support through a large group of volunteer workers, who receive ongoing training. The volunteers do not act as counsellors. Their role is to provide guidance and support, helping raise the beneficiaries' self-esteem and confidence enabling them to regain control of their life and business. The volunteers are assigned to each beneficiary, pointing them in the right direction to access medical treatment, counselling, financial help etc.

There are a variety of individuals and organisations (voluntary and statutory) with which SRSSN networks to assist a beneficiary (e.g., Trading Standards, the police, land agents, banks, mental health services, social services, other specialist helplines, lawyers, business advisors, feed companies etc.). The networking works in both directions. Any one of these organisations may contact the SRSSN about a rural dweller who appears under pressure and for whom they are concerned. Equally the SRSSN may ask for any of these organisations co-operation to help a beneficiary. The SRSSN also tries to educate and inform these organisations on the facts about rural stress. Unlike many of the farmer support groups on the continent, the SRSSN accepts third party referrals. Since there is often a reluctance amongst farmers and other rural dwellers to seek help, this is a vital feature of the group's work. Without it many beneficiaries could receive no help at all. Since May 1997 the SRSSN has dealt with over 160 requests for assistance.

Networking regionally: organic growth

The RSIN reported in early 1999 (Read, 1999) that many CRI's were beginning to discuss ways of working in closer co-operation with each other and the regional structure seems to be growing organically. It seems increasingly likely that this is the direction in which all support groups will develop in order to secure funding. The SRSSN is currently holding meetings with groups from surrounding counties with a view to forming the West Midland Rural Stress Support Network.

Discussion

Networking at local level helps overcome many of the problems caused by isolation discussed earlier. There is evidence that, through raising the profile of rural stress, the SRSSN has helped reduce the stigma attached to asking for help (Monk, 1999). Through education it has helped other organisations understand the problems facing the rural sector and so appear more relevant and accessible to country people. Since farmers trust the opinion of other farmers, the volunteers are carefully chosen so they demonstrate an understanding of farming and the problems facing the rural sector. They can then act as an interface between rural dwellers and the services available, helping each contact the other. The SRSSN believes that it has developed a model that can be adapted by other counties, or countries, to suit local needs and promote rural mental health.

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KEYNOTE ADDRESS
Rural Health Issues

Gary Hart, USA

W. C. Fields said something about following children's acts and they were wonderful. I am really happy to be here. In fact I guess as I've gotten older, I'm just happy to be anywhere. This is an interesting presentation, I originally thought that I had made a vow that my last presentation that I was going to do them on my lap top. I was keeping that vow, couldn't get everything transferred, then got caught in between them, so I have overheads which I'm mostly going to use.

Yesterday, listening to some of the presentations I was struck by some of the things that were said and last night made some changes in what I'm going to talk about. So things may seem a little more disjointed than they would have otherwise but I am trying to make things more relevant than they would have been some other way.

I am from a program called WWAMI. That's a strange name;it stands for Washington, Wyoming, Alaska, Montana and Idaho. The northwest part of the United States. Back in the 1970's just for a couple of minutes there was reason prevailed and they were building medical schools all over the country and this group of States decided to build to just build one medical school and that the States would all use it and that is the University of Washington. We have a regionalized medical education program and so each of the States Legislatures appropriate money to the medical school and in exchange for that medical students are brought in from each of the various states. We have a motto around the program which is "to try to keep people out of Seattle as much as we can". One of the priorities with the program is to train rural physicians and the more we get them in to Seattle, the more they have opportunities to marry spouses that are urban. There is a whole series of kinds of things that happen to them. So we try not to have them be there very much except for where we need it for accreditation. Even the first year of medical school none of them come in, they stay in Boise, and they stay in Anchorage, and they stay out in these other states. Then they come in for us but while they are in with us being trained we send them out for the summers to be with role model family physicians in towns. We make requirement research projects for them and try to make it a rural research project. There is a whole series of sorts of things including even visiting the junior high's and high schools of local physicians and getting people interested in rural health and see that as something they can become.

Probably the single most impediment to us right now is how many rural kids apply for medical school at the university. They just don't apply in the numbers. In fact we have looked at that carefully and the rate of applying to medical school from the rural areas of our region. It's half that of the urban kids. It's half. We accept them at the same rate, they get the same grades, they graduate the same, we can't tell them apart ever, in terms of how good a physicians they land up being. Their clearly, if they come from rural areas, much more likely to return to rural areas to practise, but it is at applying. We have looked at not just us but what if they applied to other medical schools and other places they still apply to those at half the rate. So one of the real challenges for us is to create educational programs out there for the students so they get the science they need so that they can apply and be competitive. Secondly, to help create role models for them and help them to understand and see that as a path way in their lives and we are not still doing well at that. We are trying to do better but that is a significant problem for us. We originally had a problem with getting them accepted into the school.

The University of Washington is a real high tech, bench research kind of medical school in the nation. And what happens was historically the selection committees became very much oriented toward neurosurgeon type characters coming in to apply to medical school and over the last decade we have managed to really change that too. There used to be a selection committee of eight people who were mostly bench researchers, now it's fifty and a bunch of those are rural physicians. So we are really trying to change the mix of the students. We still want those bench research types because there is obviously a role for them but we are trying to get a better mix so that we get an opportunity to get more of the rural kids in and now it's the application process that's the hard part for us.

We have a residency network program. Family medicine department has eighteen residencies scattered across the five states. Those residencies are for when you are finished medical school and you are specializing in family medicine. There are eighteen of them spread around and this is a very unique program in the states. Only a few schools have these kinds of programs. One of the programs out of Spokane has a rural training track. Now we try to keep them out of Spokane because that's a smaller city and we don't want them there either. So they spend some of their time there because they have to have some surgical experience and various kinds of things there but we put them out literally for a year in to smaller places of the ten thousand and five thousand, and as small as we can get them and get them accredited and we put those students out in those kinds of areas in these residencies.

So we have a large residency program trying to get rural physicians experience in rural places with rural physicians, so that they can do a better job. A lot of folks when they talk about that kind of work, talk about it being the reason that you are doing it is so you get more rural physicians and that is certainly a part of it but one thing I keep reminding folks about because they are always evaluating - do you get more, don't you get more, their selection, it's not randomized, how do you know you wouldn't get all of them being rural physicians anyway? All those are valid points but the come back to all that is if we didn't get one extra rural physician and those rural physicians practiced better and fit in better in rural towns and became better rural physicians. That would make the programs worth just doing that.

I testified at Medpack a while back, which is the Medicare Policy Advisory Commission for the Congress, and one of the last questions asked of me was "why should we waste money training people in rural places?" which wasn't even the topic that I was talking about but never the less somebody threw it in at the end and one of the things I tried to explain to him was, I said," well let's reverse things, just go with me for a minute and think of the world as being different from what it is. Let's just for a minutes play like history was a little different and all the rural doc's and all the doc's in the world in U.S., which is not the world clearly, I can differentiate that, everybody there can't but I can. Let's just say they all were trained in rural places and let's say all those doc's that were going to practise in inner cities to various groups the indigent and others were being trained in rural sites, would it make you uncomfortable at all to send them to inner-city emergency rooms to practise and if it does just don't ask me the question. And it better make you uncomfortable because that wouldn't be the training they were getting. So in any event we are a large educational program, we are actually working in the Pacific right now doing continuing medical education in places like Pilow and Casari and Ponipa, which are all rural places although we don't think of islands out in the Pacific that way.

The other thing that we do a lot of the centres that I am connected with. I'm the Director of a Rural Health Research Centre at the University of Washington and the Director of a Health Work Force Centre. The Rural Centre has been around since the twelfth year as an official Federal, National Work Force Centre and one of the things that goes along with our Work Force Centre is another program called programs for Healthy Communities which has been around since 1980, about twenty years ago where we have been doing Rural Community Health Development. Which is a little different than what a lot of you folks have been talking about but there are a lot of similarities. We basically go into small towns, at their invitation, I've done well over a hundred of them in the last decade. In those towns we do several things, we do an inventory of the health care that is there, we look at and interview - two of us would interview people for a day and a half at an hour a piece, talk about health care, we would survey the community related to where they go for care and how they rated care and how they felt about care and various things. We would do a fiscal analysis of the local hospital if it has one or the local clinic. We usually produce some kind of document that sort of notes all these things and talks about the strengths and weaknesses in the town. What the document doesn't talk about is what they should do about it.

What we do is in the end we meet with and have as partners in all this the hospital administrator, the hospital board, the local health care providers, and community members. In the end this sort of culminates all this, it's the beginning not the end, all this culminates in a community meeting where the documents have been available, we sit down and talk about what they mean at this community meeting, folks start prioritizing as a community which things they are most interested in which things they want to work on, it doesn't have to be what you can affect may not be the thing on top of the list, so part of it is what you can change and then we go through this process and people vote and we refine things and make committees. It is not us, it's the town, we are acting as a catalyst, not as the goers and doers. What doesn't happen at the end of those meetings, we then facilitate, you decide that you want to do this and you need somebody to help you by doing that we will go help try broker that person for you or broker the resource for you but it's about the town doing it and it has really been a wonderful process and it puts ownership and it empowers the town that they can change things. It is something that we have been working at for a long time. It has worked well in the State of Washington where we are. The Hospital Association basically after seeing how well it worked has taken over doing a lot of that and we are not doing as much in Washington anymore because they are doing a very good job and we don't need to have competition. It's not about competition.

The other thing I want to comment on, it was talked about the other day, was a sense of place. I'm a medical geographer by background, like Jim indicated and that's always been part of the way that I was educated. Is in the geography. A lot of the discipline of geography besides doing spatial analysis and statistics and research and things is more the geography that you think of which is what takes place in school. As you know, as we have increased emphasis on science and math and other things, the history of things like geography and history and requirements and how much students have to take has changed dramatically. I think that really goes along with what Paul and Tony were talking about yesterday that as those things have dropped away people lose it. That's how you put things in to perspective and that's how you get the sense of place. Geographers do things like mental math. Where they have people draw things and then you put these maps together and you can see how groups of people are perceiving where they are and a whole list of other things along those lines. But the geography and history allow people to put things in perspective where they are. Invariable, geographers when they are teaching courses wherever they are teach courses that relate to the place where they are. We may talk about the world and this and that but it is always brought back to relating it to the environment. The definition of geography most people use is that it is it's relationship between man and his environment/persons and their environment is now a days I suspect more appropriate. In any event it is that relationship and we are very happy, unhappy to see this kind of emphasis on place. Again these programs that we have been working on for years have been ones that have been around kind of empowering people.

Let me just speak about a little bit of background of what has happened to work force the last bunch of years. What I really have is a presentation that takes over an hour and we are going to only do a little bit of that, probably here at the end and I'll cut it off at some point so I can hit some issues with you. I want to give a little bit of background and talk about the political side of things that have to do with rural. I'll speak for the United States because that is what I know best. I think Canada actually has paralleled a lot of the things that I am going to speak about in terms of developmentative providers, as have some of the other countries such as Australia.

Roger Rosenblatt and Ira Moskovice, two friends of mine and Rodger has been my partner for twenty years came up with a way of talking about the history, the development of medicine. One of those areas is from 1625 to 1850, just bear with me a little history here. It is called the Aquarian era and it was the era when physicians were apprentices. They were very much like tailors and other things. They were apprenticed and at some point they took over there was no licensing. From 1850 to 1910 there was this big industrial growth period and rural places even during this period are still healthier. Cities are dirty places, cities are places where people die when plaques come you go to the country to get away from them. It is very different, think of that change. There are still shortages but physicians in country areas are as likely as they are in urban environments. 1910 was an interesting year, a guy named Abraham Flexner, wrote a report and it acted as a catalyst. It really changed medical education where instead of being trained in apprentice mode, it became very much more centralized, licensing kinds of things, certifications, medical schools had to be accepted, they had to have special curriculum to be accredited, that sort of thing took place. There are parallels in all disciplines. Public health grew especially in rural areas as things were cleaned up in urban places and then basically toward the end of that period in 1940 the depression hit in 1929 and 1930 and with that depression, seven hundred rural hospitals closed in the United States. 700 and there was dramatic shortages, centralization was taking place. So in 1940 to 1970 is another period, it's called the Hilberton and the War on Poverty - Hilberton was a Congressional Bill that was passed that put in a lot of money in to rural building of hospitals and health care facilities. So a lot of those 700 hospitals that were destroyed, new ones were built, specialization continued, a lot of specialization became as generalists started to become the exception. The centralization of the medical schools and large universities continued dramatically. This again, the shortage of physicians and other providers in small rural places became acute. Toward the end of that period because of these shortages in the States, Medicare, which is insurance for the elderly, Medicaid, insurance for the poor, the National Health Service Core, that's when you send physicians to places where there aren't physicians in return for having paid for their education and community health clinics which are again for clinics that are built in places where physicians basically won't go and where there are lots of folks that are indigent. These were created all those programs, they came about within three years in the late sixties. The next period, Ira and Rodger called it the technology era from then to the present. The present was 1983 when they finished that book. There was still basically a crisis. Technology as you know has gone just crazy, especially in health care. The specialization we were talking about continues and in 1970 there was a real reaction against the specialization and family medicine was created as a discipline in which you got boarded. General internal medicine developed, general pediatrics developed, there was a move to add added status to people who were generalists. This is all going somewhere, trust me!

I actually have called the seventies a little different - it was the access era in the States, where all those programs that I named before really started - access was the issue. Everybody was very interested in access. With 1982 just about the time when they wrote the book another era came in, it came in with Ronald Regan and has continued since then in the States for the last eighteen years and that's a cost control era where cost has been clearly the number one issue that has faced folks. In 1983 perspective payment came in. Perspective payment system was one where hospitals were paid set amounts for when people came to those hospitals and somebody came and they had an appendectomy you got "x-amount" of money, period, and there were some adjusters but not very many. 250 rural hospital closed, "do you notice some pattern here, we keep closing them, then we build them, and then we closed them." Well 250 rural hospitals, ten percent of all the rural hospitals in the United States closed in about five years because that method of paying hurt those hospitals very much. Manage Care came in, regardless of what you hear from folks about Manage Care and Prevention which is not happening much related to Manage Care. Manage Care when it is said by somebody in the U.S. Congress should be interpreted in another way. It is like a foreign language. Manage Care means equals less care and the reason you save money is not because of the economies, although there are little bits of economies, the reason you save money is because you give less. You notice when they went to Manage Care they cut billions of dollars out of the budget. With the billions of dollars that they cut out wasn't because it was so efficient, everybody got the same care, they just said Manage Care and cut a bunch of money out and they gave less service. There were some budgetary reasons for that and it is not about the politics of this but the net effect has been for the safety net folks - the indigent, the poor, the racial and ethnic minorities have suffered dramatically over the last eighteen years related to that. Then the newest, interesting move was in 1997, it is the Balanced Budget Act of 1997 which was the biggest reform that there has been in fifty years in health care financing. We did a lot of work on the Balanced Budget Act of 1997. It cuts out one hundred and twenty-eight billion dollars out of health care and that isn't because of efficiency, it is just cutting it. That one hundred and twenty-eight billion dollars came out of everybody's hide but specifically for rural hospitals. It made a perspective payment system for Nursing Homes, Out Patient Care and Home Health. There were others but those three are the big ones, especially Out Patient Hospital Care. This was effected dramatically. We did a study where we did site visits at six hospitals across the country for the policy debate after the fact and we analyzed those hospitals. We found these small rural hospitals that we picked in states all over the country, they were ones that the Hospital Association or the Office of Rural Health told us that they were the best managed small remote hospitals in the States. This is everywhere from Pennsylvania to Montana to Mississippi. Everyone of them lost in the period of putting those things in, would have lost and gone in to the red by hundreds of thousands and we predicted two of them could not have survived and most of them would have had to cut their services dramatically.

As part of that and what a lot of other people did the Balanced Budget Refinement Act of 1999 was past this last year which basically delayed things. It didn't fix much but it delayed most of these things from being implemented. Although some of them have already hurt a lot of the hospitals and a few hospitals have even closed. The bottom line is without getting too much in to the long term politics of this is there is a crisis in the United States right now, if there is still a shortage it's never changed the providers in rural places but there is a dramatic shortage of services related to this Balanced Budget Act of '97 that is dramatic. There are people who are speaking of 5-6-700 hospitals closing. That is twenty percent of all the hospitals in the country. Be aware of what is going on. I guess the question I wanted to present again and it is away from what I had originally prepared and I do have seventy overheads here, but I'm not talking about those right now, "Is why does that happen and what allows it to happen in a country like the United States?" Sixty million people live in rural United States, that is as many people who live in the United Kingdom, as many that live in France. "Why is it that these policies are so hard on them?" I think there are a couple of reasons. One is how urban centric this society has become that in effect by saying twenty percent of the population is rural, we are saying eighty percent of it is urban. The legislators for the most part are elected from urban majorities. That changes the way they look at things. More important I have come to believe over the last few years of doing a lot of policy work has been the bureaucrats are urban. That is the Health Care Financing Administration in the United States, that is the group that pays for the things like Medicare and Medicaid. They do the reimbursement and is a huge and relatively efficient bureaucracy that deals with the finance. Those folks who do that for the most part live in Baltimore and work in a suburb of Baltimore and I have gone there and taught a class on "what is rural" and most of those folks have never seen a silo, don't know what a cow is. It sounds like an overstatement but they are just lost. They don't have a clue. It isn't that they hate rural places and they write policies that are nasty, they just don't understand. So one of the things we try to do a lot is we try to get folks to let us take them on site visits and we fly them out to wherever, to Wyoming was the last site visit. We took a couple of the senior folks, we flew out not long ago to Cheyenne Wyoming and we drove them to Thermopolis Wyoming, which is about two hundred and ten miles through absolutely nothing. You don't see anything between the two points and they had never seen empty space, they had never been west of the Mississippi. "Oh gee whiz, ambulance service is really important out here." It's amazing because you think in this day and age that we live in that people know. Medicine is urban for the most part, medical schools call the shots. There are one hundred and twenty-five of them in the United States and there isn't any of them in a rural place - none! Most of them are in very big cities. Like New York City, I think has eight. The committees that make many of the decisions, like Medpack, that I talk to. The Medpack committee and it's predecessor for the last twenty years has had nobody on it who has had a rural interest, nobody. Somebody was appointed this last year, it was a big deal to get somebody. About six months ago we gave a presentation in front of Medpack and we were the first people who had the topic of rural health, who ever presented to them in the twenty years of their existence. Fifty-five million people. The other thing that goes on in this process and we don't have time to talk about the legislative process, nor would it be interesting to many of you because each country is a little bit different is that there is a process by which we called it in a recent article, "the one size fits all mentality." When congress passes anything they want to make it simple. Health Care Financing Administration wants to keep it simple. Everybody wants to keep it really simple and so what they do is they make a set of rules and the idea historically has been just a band-aid kind of thing and we will make the policies and we will see how things follow and then we will make little band-aids to fix it after the fact. That is the federal policy about the policy and it is the way things have gone for a very long time. Well what has happened is the thing that they don't understand that many of you understand is how vulnerable small rural places are. These are not places like big cities where you can close two hospitals, you still have three, things just sort of rebound, it's fluid, there is lots of money, there is opportunities to do things, there is safety net facilities, like the public hospital that can take care of folks. In most rural communities there is one small hospital. It is usually the biggest employer in the town by the way and it is interesting money when you start thinking about insurance and things. There are different kinds of things if you go to economic analysis there are different kinds of places, sort of the multiplier factors or sometimes when you are just exchanging money in town but when insurance companies are paying money through a hospital in to town that is money coming in from outside just like you were selling gold and bringing the money in. That money multiplies in the town. So in any event there is this "one size fits all" kind of a mentality that just pervades everything but this vulnerability we really manage to as these hospitals close. That two hundred and fifty hospitals that closed, not one re-opened, even when things got better. So there is a real mission to be accomplished related to these places. Over the last twenty years, rural has emerged, we have just finished an article that talks about that re-emergence and how it has taken place. The National Rural Health Association, lots of places, a bunch of research centres that were able to put real data in peoples hands about what was going on and I would love to talk about some of that with you as time goes on.

Let me just mention a couple of things, for those who are interested from the States or any of the other places, this is not the book that I have been advertising that is coming out in August. This is another book that came out about six months ago, Tom Rickets is the editor and it is called the Rural Health in the United States. It is a very good book, it is the newest thing this decade, that gives good numbers and things about what is going on in rural places. A couple of policies, that are really important, that I need to mention. Recruitment, retention, the shortage of providers in rural areas is tremendous. That is at the macro level of policies and training. Training being the first big step. At the micro level is teaching people how to recruit and how to recruit spouses, which is incredible important. How to keep folks and retain them in a rural community. There are whole books written on the subject on recruitment and retention. The big issue right now for us in the States and it is going to be an issue for Canada and Australia too is that every year - good news - every year more and more women graduate from medical school. It was two percent, five percent, and right now it is 35 percent across the U.S. Medical Schools. Our school it is fifty-eight percent right now. In some disciplines like pediatrics it is seventy percent. In some things like OBGYN it is eighty percent female. That's good. The bad news, female physicians are eighty percent less likely to go to small towns to practise - eighty percent less likely and forty percent less likely to go to big rural towns. That's a problem. What we have little research on and know little about and very few people are working on, we are trying to do a bunch of studies related to that, is "how do you retain, recruit, make happy, women to work in small rural places." It is a real challenge and it is going to get harder and harder and put more and more pressure on places. Again, it is tremendous. I have a map that shows some states like Arkansas. Arkansas has eighteen male rural physicians to every female physician - eighteen to one and the ratio and like I say there are more and more females and you can see what affect that can have.

Finally, one of the things that I talk about and there are all kinds of policies going on related to license insurer and safety net issues, rural docs, in general rural providers give away, we have been doing some surveys and visiting and doing site visits, fifteen to twenty percent of all their effort is given away - is charity. Twenty percent! Most federal governments do all kinds of programs for the poor in urban places, they sort of let the rural docs just make it or not make it and they don't subsidize and don't help them in particularly but because it is the different kind of person that is and the different culture there is in these rural towns, they are giving away fifteen to twenty percent of their town. We can't make it too hard on them so that they have to leave in order to send their kids to college. One last thing about rural health. Three things that will never be solved until these - rural health problems will never be on even footing until we deal with several things. One is the uninsured, especially in the states. As long as there large numbers of uninsured that physicians and other providers see there, they are going to get less income and they are going to do it anyway and those folks need to be seen and need the insurance. Secondly, the only way we will have lots of rural providers in the long run is if we can create an environment that isn't incredibly hampered and strained and tight where the hospitals are closing and you don't know where the next money is going to come from and where there is not enough resources at all. That there is such a nasty health care reimbursement environment that nobody wants to be there, that is the other thing. Thirdly we have to make an environment for rural practitioners and rural people in general that creates a rewarding socially, a rewarding life that is financial remunerative. There is an often a lot of people in towns that see the doc and he is one of the riches guys in town. So there is a tendency to not want to give him a break whenever they get a chance to but the bottom line is this is a comparative world and it needs to be remunerative to them at least to the level that they are not drawn away to other places. We have to create an environment that is satisfactory socially and professionally and gives opportunities for growth for the rural providers or they are never going to stay there. And finally, and I have to say this is the last thing I always say in one of these lectures, none of this and I have talked about it at the federal level and the physician level, and the other providers kinds of levels, none of that relieves what we do in our community help development work with rural towns which is saying you can't do much about what the feds do but you can do a lot about is how efficient you can do. Rural towns and the folks who live in them have to take responsibility for using the resources they have as efficiently as they can to get the most out of them. There are some really efficient towns that really do that and have great leadership. There are other towns that we visited where that is not true and a responsibility has to be that the local folks take responsibility for themselves and do as best they can with what they have and we all work for other kinds of changes.

Well I'm sorry for being foreshortened and I got off on some tangents but I felt that that was more relevant than what I more formally prepared. I would be glad to talk to any body here and try to catch me today as I will be leaving early tomorrow morning. I am very much enjoying being here.

KEYNOTE ADDRESS
Rights for all: the human rights of rural citizens

Chris Sodoti, Australia

Introduction

The Australian Human Rights and Equal Opportunity Commission was established in 1986 by an act of the Australian Parliament. It has a wide mandate to deal not only with discrimination issues but also with human rights issues under international human rights law. The Commission handles individual complaints of discrimination or human rights violation but it also has a more comprehensive role to undertake public inquiries and investigations into broader patterns or systems of human rights abuse and a public advocacy role.

Since its establishment, the Commission has conducted public inquiries into many particular situations of human rights concern, including

- the rights of homeless children
- human rights and people with mental illness
- access to clean, safe water in remote communities
- access to appropriate health services
- violence based on race or ethnicity
- children and legal processes
- discrimination based on pregnancy
- the rights of Indigenous children and young people.

In every case we found that the experiences of rural and remote Australians differ significantly from those of urban residents and that rural and remote Australians have distinctive human rights problems. For that reason, many of our reports on human rights issues have had to include specific sections or chapters on the dimensions of the particular issue in country Australia.

Bush Talks

Soon after I was appointed Human Rights Commissioner I published a paper, in May 1986, on human rights in rural Australia. The overwhelming response to that paper convinced me of the need to do much more - to look comprehensively at what is happening to human rights in rural, regional and remote Australia. In 1998 we decided to undertake a program, called *Bush Talks*, of consultations in rural Australia.

Bush Talks was a program of listening, of inviting people to tell us about their experiences, their needs and their concerns. During 1998 and 1999 we visited over 50 communities in all eight of Australia's states and territories. They ranged from larger regional cities to small country towns to some of the most isolated communities in the world. They included places like Papunya, an Aboriginal community of around 150 people, in the Tanami Desert in central Australia, about 300 km west of Alice Springs, which itself, with around 20 000 people, is the largest town in 2000 km in any direction. At each place we held one or more public meetings, met with particular groups within the community and visited some of the local community services. We have published summaries of almost all the meetings on the Commission's website (at **http://www.hreoc.gov.au/human_rights/rural/bushtalks/index.html**) so that the information would be available to anyone interested in it.

We saw and heard at first hand the diversity of rural communities. Rural and remote communities across Australia are by no means homogenous - indeed there are great differences by state and territory, size of town and environment. Some rural communities are thriving, with strong local economies and good services for their residents. Others are reviving, with a new sense of spirit and new ideas for social and economic advancement. They have energy, ideas and many models of how to create a functioning community.

Others are deeply depressed. Many communities in rural Australia are under siege - they have declining populations, declining incomes, declining services and a declining quality of life. The infrastructure and community of many rural, regional and remote towns have been slowly pared away. It was described to me by a woman in Port Augusta as the "dying town syndrome," a spiral of decline as services are withdrawn and people leave. People are moving out of towns where they can no longer make a living or find a job.

In the words of a woman from a small town in New South Wales

> *As we head for the year 2000 my greatest concern is for the viability of small rural towns which are slowly being obliterated by loss of services, institutions and medical care ... We all need to fight this insidious process or there will be only ghost towns where busy and fruitful communities once flourished.*

In spite of their diversity rural towns and communities in Australia have in common not only geographical isolation but also a strong sense of rural identity. This identity is increasingly enhanced by the very experience of being forgotten by government and by urban Australians.

Wherever we went in our consultations, people welcomed us warmly and spoke to us freely about their lives. We became convinced that the human rights of rural and remote Australians have been significantly neglected compared to urban Australians. To describe this, I need to begin with some comments about what I mean by human rights.

What are human rights?
Human rights belong to every person by virtue of birth. It does not matter who you are or where you live. Human rights are ours to be enjoyed simply by reason of our common humanity and innate dignity as human beings. They are not only for majority groups or for minority groups but for everyone equally and without discrimination.

Human rights are also not granted to us by others or by the government. They are ours to be enjoyed simply by reason of our common humanity and innate dignity as human beings. For that reason we cannot agree to give them up and they cannot be taken away from us.

Most people in western democracies like Australia, Canada, the United States and in Europe are aware of their civil and political rights, for example the rights to freedom of expression, freedom of movement and freedom of religion and belief, the rights to a fair trial and to due process and the right to vote. These are of course fundamental human rights, which are set down in international treaties, most importantly the *International Covenant on Civil and Political Rights*. They are well known because they are the category of rights that have found expression in bills of rights such as in the US Constitution and the Canadian Charter of Rights and Freedoms and in the European Charter of Human Rights. But they are not the totality of human rights by any means.

Matters relating to people's social, economic and material well-being are equally matters of human rights, even though western countries and governments have traditionally given them little or no attention. These rights are set out in the *International Covenant on Economic, Social and Cultural Rights*. They include the right to an adequate standard of living. The enjoyment of this right requires, at a minimum, adequate food and nutrition, clothing, housing and necessary care and support such as health and medical services. Human rights also include the right to work, the right to social security and the right to education. They impose obligations on governments not only to protect people from violations of these rights but to take action to promote and ensure these rights for all people within their jurisdictions.

These rights are often overlooked by governments because they raise issues of public welfare and public spending. In a climate of fiscal restraint governments are reluctant to face issues which require more spending. And in a climate of economic rationalism governments reject many spending options that, in purely economic terms, are not cost effective. However, most governments, including those of Australia and Canada, have ratified international treaties that recognise these rights. Ratification is a solemn promise that obliges governments to uphold these rights and ensure that the basic needs of every person are satisfied.

[I should comment at this point that my analysis is not as applicable to the United States as to other nations. The US has one of the lowest levels of participation in the international human rights system. It has not ratified the *International Covenant on Economic, Social and Cultural Rights*. It is one of only two countries that have not ratified the *Convention on the Rights of the Child*. The other is Somalia. Somalia has no effective government.]

These two sets of rights, civil and political rights and economic, social and cultural rights, are not mutually exclusive. They are most definitely linked. For example, a society that promotes and respects civil liberties is more likely to be well placed to enjoy economic growth and good standards of living. At the same time, where there is economic inequality and poverty, where health is neglected and education denied, civil and political rights often suffer.

Many will argue that social, economic and cultural rights are difficult to measure or attain, as circumstances differ so substantially from country to country. Economic inequality has not been solved anywhere to date. Unlike the right to vote, it can appear impossible for governments to guarantee the right to work. Consistently high unemployment, especially in rural Australia, despite good intentions of governments at every level, has taught us that there is no quick solution to extending these rights to everyone.

However, the *International Covenant on Economic, Social and Cultural Rights* is a means of getting governments to measure their achievements or failures and to commit to progressively attaining realisable goals. Unlike the *Covenant on Civil and Political Rights*, it commits each state party to achieving the rights progressively, but this does not mean that they are not achievable. And importantly, governments must guarantee that these rights are protected and enjoyed without discrimination of any kind.

That is why human rights are important to the development and well-being of people in rural areas. The human rights approach represents a paradigm shift. It is based not on appeals to charity and certainly not on arguments about economic viability but on the entitlements of human beings as human beings, wherever they live. It places their well-being not in the basket of discretion in government decision making but on the list of government obligations and therefore government priorities.

Human rights law then provides an internationally agreed moral or ethical dimension to rural development.

Human rights in rural and remote Australia

As I have mentioned, over the last 2 years I have travelled to over 50 communities in rural and remote Australia as part of Human Rights Commission's *Bush Talks* consultations. We reported on the first part of our consultations in February 1999.
The report is also available on the web (at **http://www.hreoc.gov.au/human_rights/rural/bushtalks/index.html**). These consultations involved both listening and talking to these communities about their human rights concerns. They confirmed what many people in the country had been aware of for several years. In terms of basic economic, social and cultural rights, the country is generally coming off second best to the city.
Country Australians do not enjoy

- the right to education
- the right to the highest attainable standard of health
- the right to an adequate standard of living
- the right to take part in cultural life
- the right to enjoy the benefits of scientific progress
- the right of access to employment opportunities

on an equal basis or in some cases not at all.

In launching *Bush Talks* we promised that we would not consult for its own sake. There are too many examples of "vacuum cleaner consultations" by government and other organisations – go in, suck out all the information and never be heard from again. We said that we would respond to what we heard, that we would develop our work programs around the principal issues raised with us by the people we met. We also promised that we would make the results of our consultations generally available to country people as we found very earlier in the piece that communication and information across country - from region to region - are almost non-existent. Finally we promised to take the voices and concerns of country people into the cities, where most of our people live and so where most economic and political power arises. I consider that we have met those promises.

While there were always particular local matters raised with us, two issues predominated, coming up at every meeting we attended: education for children and young people and access to adequate health services. These and many of the other issues raised with us are fundamental human rights issues.

Education

The right to education is set out in the *International Covenant on Economic, Social and Cultural Rights* (1966) and the *Convention on the Rights of the Child* (1989). This right must be ensured to all without discrimination of any kind.

The provisions on the right to education are quite specific about the content of the right, including free and compulsory primary education and access on the basis of equality to secondary and further education. They also deal with the purposes of education, especially the development of the child's personality, talents and mental and physical abilities to their fullest potential.

Although human rights law guarantees the right to primary and secondary education, the *Bush Talks* consultations found that in many rural and remote areas of Australia there are significant impediments to children's access to educational and cultural opportunities. In response to this, the Commission initiated in March 1999 a National Inquiry into Rural and Remote Education. This has given us the opportunity to hear from a large number of teachers, parents and community members about education in their communities. We also heard from students themselves, at both primary and secondary level. Under article 12 of the *Convention on the Rights of the Child* children have a right to have their views heard and taken into account. So we considered we had a special responsibility to listen to them. We met groups of students, in the absence of their teachers and parents, in every community we visited. In this way during the course of last year we had direct personal contact - face to face or by telephone or in writing - with around 10 000 people from all over Australia.

We were assisted in our inquiry by six special commissioners appointed from each mainland state and the Northern Territory. They included people with decades of experience in rural education and administration, academics, indigenous education experts and a 17-year-old school student.

During our meetings and through formal submissions and a national survey, we learnt that children in remote and rural Australia are less likely to complete their education than children in regional and urban centres. Whereas 67% of children in urban areas complete year 12 at school, only 63% of rural students and 54% of remote students do (1998 figures). In some areas the school completion rates are truly appalling – for example, only around 16% for Aboriginal children in rural Western Australia.

There is also very significant disparity in school attendance rates of 16 year olds, with the highest rates in the richest urban areas (in excess of 96%) and the lowest in the poorest rural and remote areas (between 40% and 50%). The national average is 80%.

We also heard that some of the main problems are the cost of schooling and the lack of income support for families.

Many rural and remote students need to travel long distances to get to school. While this is an element of life in the country, for children this can mean tiring journeys. It can have a serious impact on their access to schooling. Many remote areas do not have public transport and are situated a long distance from a school bus. This can mean extra costs and time for parents in transporting their children to school. This can even effect access to education.

For example, the children of a family living 48km from Scone in New South Wales, a relatively well populated area, must leave home at 7.15am, be transported 13 km to the bus stop and then catch the bus to school. They don't get home until 5.10pm. This is a very long day, especially for young children. Travelling times can exceed this in many other areas of Australia. Many children travel for over an hour each way every day. *Bush Talks* was told that because of this children do not attend pre-school and are kept back from primary school until they are six.

Although distance education reaches isolated children and has some very positive results for many students, it is not appropriate for every child and every family. It also needs to be adequately resourced to address the difficulties of teaching without face-to-face contact and the lack of technological infrastructure in many rural and remote areas.

Many students told us of a lack of curriculum choice and of sporting and cultural opportunities. In the Warmun community, for example, out in the East Kimberley in Western Australia, students may have to travel hours to compete in a sports event. When asked what they wanted, one year 8 student at Warmun said he would like something as simple as goal posts for the school field. These are things are taken for granted by urban students.

Lack of curriculum choice can be a major reason for declining enrolments in secondary years of rural schools. Families feel as if they have no other choice but to send their child away to boarding school, or to move to another town, to give their child the same opportunities as children in urban areas. In some places on the Eyre Peninsula in South Australia we were told that students who want to study music have no choice but do it by distance education. One student found it impossible to study her instrument over the phone and eventually gave up her study, although she was talented and would have pursued this at the tertiary level.

The right to education is suffering most seriously in rural and remote Indigenous communities. Retention rates and participation rates are well below that of non-Indigenous students. The apparent retention rates of full-time Indigenous students in Year 11 are as low as 47%, compared to non-Indigenous students at 83%. In rural Western Australia, as I said, only 16% of Indigenous students in country areas complete Year 12.

In the Northern Territory a significant number of students are not participating in education at all. The majority of these students are Indigenous students in remote communities. Around 13% of indigenous boys do not attend school even during the compulsory schooling years (4 to 14). Only 39.7% of Indigenous girls and 28.2% of the boys in the 15 to 19 year old age group are enrolled in school. Actual daily attendance at school is likely to be much lower than this, as participation rates relate to enrolment only.

Because of distance some remote Indigenous children are unable to access primary school. Other large Indigenous communities have no secondary school. We were told,

> *There is a primary school in Papunya, but throughout the whole of Papunya region there are no secondary education facilities. Students who have completed primary school therefore have to move to Alice Springs to further their education. This lack of accessible secondary education facilities is reflected in the fact that only 1% of Indigenous people in the region aged 15 years and over participate in secondary education. There is a strong wish for a regional high school in Papunya but this proposal has not been well received at a government level so far.*

We were told in many Aboriginal communities in the Northern Territory that their children simply have no effective access at all to secondary education, a very serious human rights violation.

The Inquiry has also heard from many people in rural and remote communities who are critical of the lack of cultural appropriateness and relevance of education for Indigenous studies. Without exception Indigenous people in rural and remote communities expressed their aspirations for "two ways" or "both ways" education for their children so that they would could participate proficiently both in their own Indigenous community and in the more general Australian society. Employing Aboriginal teachers and workers in schools is vital to supporting Indigenous students through the schooling system. And yet the Inquiry heard many times of inadequate numbers of Aboriginal teachers and Aboriginal workers in rural and remote schools.

There is no doubt that culturally inappropriate or irrelevant education has a major impact on educational outcomes. The *Convention on the Rights of the Child*, ratified by Australia, recognises the right of Indigenous and minority children to access education which ensures their right to enjoy their culture, profess and practise their religions and use their own languages.

Another serious issue raised in the Inquiry is the lack of support in rural and remote areas for children with special needs such as a physical or learning disability. Without adequate special education teaching support in rural and remote areas, families with children with a disability are forced to travel long distances to access appropriate education or send their child away or move the family to an urban centre - or deprive their child of education.

We have concluded that for many children in rural and remote areas of Australia the right to education as defined in international human rights treaties is being violated in serious ways. We are now developing our recommendations as to what must be done to redress this situation. We know that ensuring the right to education for rural and remote children will have resource implications. Some things we will recommend will be cost free and some will involve better and more equitable use of existing resources. But the bucket simply is not big enough and significant additional funding will be required. There is no escaping that.

We released the first part of our report of the National Inquiry into Rural and Remote Education in February. The next part, our recommendations paper, will be tabled in the Australian Parliament in June. We will also be releasing two other separate documents, one on the provision of education, including issues of effective access and information technology, and the other on community involvement in schooling. These reports, summaries of all our meetings wherever we went, transcripts of formal hearings and the report of a national survey undertaken for the inquiry by the Youth Research Centre at the University of Melbourne are all published on the Commission's website (at http://www.hreoc.gov.au/human_rights/rural/education/index.html).

I should also mention that we are conducting a separate project on children's participation in schools and communities. I have already mentioned children's right to participate. Many people are committed to that but are unsure how to ensure it. We have launched a web-based project, Action Exchange, in which we are inviting groups of young people themselves to tell us about their experiences of successful participation so that we can provide models that others can draw on and adapt.

Health

Health was the second major issue raised in the *Bush Talks* consultations. The right to the highest attainable standard of health is set out in both the *International Covenant on Economic, Social and Cultural Rights* (1966) and the *Convention on the Rights of the Child* (1989).

Death rates from all causes are higher in rural and remote areas than in capital cities. Rural Indigenous people die on average 15 to 20 years earlier than their fellow Australians. Rural Australians are more likely to suffer coronary heart disease, asthma and diabetes than city dwellers. Deaths of males from road accidents are twice the rate in remote areas than in capital cities. And suicide, especially of young males, seems endemic in many communities. Rural male youth suicide rates have increased by 350% over the last 30 years.

Not surprisingly, while the level of health need increases, the level of health care drops dramatically as we move from capital city to regional city to a rural or remote area. Yet instead of increasing services, it seems that many are being pared away.

The shortage of general medical practitioners in the bush is well-known and receives extensive media coverage. Although 30% of the Australian population live in the bush, only 16% of doctors do. Lack of doctors, however, is only one part of the problem. In some towns we visited not one general practitioner treat patients under the bulk billing payments arrangements in the national health insurance scheme, effectively leaving poorer people without access to medical care at all. And the shortage of general practitioners is only one part of the personnel problem: there are also shortages of nurses, dentists, physiotherapists, specialists and other health professionals.

Whatever indicator you choose, the situation of Aboriginal people is even worse than that of any other Australians. For Aboriginal Australians

- life expectancy is 20 years less than for non-Aboriginal Australians
- Aboriginal boys born today have only a 45 per cent chance of living to age 65 (85 per cent for non-Aboriginal boys) and Aboriginal girls a 54 per cent chance of living to age 65 (89 per cent for non-Aboriginal girls)
- although over the last forty years the Aboriginal infant mortality rate has declined, it is still over three times the national average; over the same period, adult mortality in the Aboriginal population has increased.

And Indigenous people in remote areas have it hardest of all. For example in the Halls Creek Shire in Western Australia child nutrition levels are comparable with those in Cambodia according to UN criteria. A second example is the deplorable lack of accessible dialysis for kidney disease among Indigenous people. They often have to travel thousands of kilometres for treatment. Wongai residents of the Ngaanyatjara Lands and other people in the Central Desert region of Western Australia must go to Kalgoorlie or Perth for dialysis. In the Northern Territory they must go to Darwin or Alice Springs. This means that they have to be separated from their traditional lands and community support.

Being separated from family, community and traditional lands can be devastating for rural Aboriginal people. One person described it to us:

> *People can't bear to be away from their land and family and some have chosen to return home. It really breaks a Wongai's heart when he has to go away. But without dialysis, patients will die.*

Many choose to die rather than leaving family, community and land. And when they do go, they see it as a life sentence, for they can never come back except to die. Support in the towns for those who go there to go on dialysis is almost non-existent. Many live in the river beds or, if they are given accommodation, their families who accompany or visit them are not.

I want to emphasise that many of the health problems which people told us about were not 'luxury' items or complaints about not having a wide range of choices. People are talking about access to basic standard health care – a doctor, a dentist, someone to talk to if contemplating suicide. Without access to these services in a rural community lives are at risk and quality of life is seriously threatened. Without access to these services people will be forced to leave their communities and this will only exacerbate the problems being faced by those who remain.

We also found many very successful local initiatives to improve the standards of health care for country people. The problem was that these initiatives were little known outside the immediate areas they serviced. There is simply too little communication across regions. So our first response to the health concerns we heard about is a project to highlight innovative models of service delivery. We are attempting to find funds to produce a series of TV spots, to be telecast throughout rural and remoter Australia, about new health models. At the very least we will be producing a publication about them.

Our second response to rural health issues is the Outlink project. As I have already mentioned, suicide rates are especially high for young rural males. For 15 to 24 year old rural males, the suicide rate is more than double that of their metropolitan counterparts. And it has increased by around 350 per cent over the past 30 years. The problem is especially serious among gay and lesbian young people. An excellent Australian study indicates that their suicide attempt rate is four times that of heterosexual young people and occurs at a much earlier age - 15 years is the average age.

Lesbian, gay and bisexual young people in rural areas experience the stigma associated with homosexuality, the disempowerment common among young people and the difficulties of contemporary rural life. Research also shows that in the face of these difficulties they often receive less than adequate support from families, schools, youth services and the broader community. They often experience a high level of isolation, as do individuals and organisations working to assist and support them. These factors combine to place lesbian, gay and bisexual rural young people at high risk of drug and alcohol abuse, conflict with family and peers, early school leaving, homelessness and suicide.

Outlink is a project to build a national network for mutual support for gay, lesbian and bisexual young people in rural areas, to share knowledge, skills and resources, and to have a united voice on issues such as community education, service provision, funding and government policy. We convened the first meeting of the interim management committee for Outlink early in April. More than two thirds of its members are themselves young rural gay and lesbian people from rural towns. They have accepted ownership of the emerging network, adopted common policies on the service needs of these young people and have planned a series of activities to connect them and support them. One of these activities will be the development of an e-map, an internet database providing access by postcode to services that are available to assist and support young people in their own localities. Most importantly, they have developed a special anti-homophobia program for country schools that will be launched later this month. Further information about Outlink can be found on its (still developing) website (at http://outlink.trump.net.au).

Outlink is based on the right to equality, the right to be treated in accordance with human dignity. For that reason it seeks not only acceptance but celebration, to assure gay and lesbian young people not merely that it's ok to be gay but that it's great.

We have not heard of anything like Outlink, directly targeting rural young people who are gay, lesbian or bisexual, anywhere else, although I would imagine that the situations of these young people in countries like Canada and the US are similar to those in Australia. We would like very much to hear about anything similar that is occurring.

Other rights

Besides health and education, there were many other ways in which the living standards of rural Australians are below national standards and below human rights requirements.

Affecting equity of access to health and education services are infrastructure deficiencies such as inadequate postal and telecommunications services, poor roads, high fuel prices, non-existent public transport, or, where it does exist, the absence of wheelchair-accessible public transport. These especially affect the elderly in rural and remote areas.

There are other fundamental services that some Australian communities still lack, such as a safe and reliable water supply, safe and affordable housing and affordable nutritious food. The relationship between these fundamental services and overall health and well-being is illustrated in a comment made by a *Bush Talks* participant in Alice Springs.

> *Chronic ear disease, due to unsatisfactory hygiene and malnutrition, can result in poor hearing and sometimes deafness. This is a big problem, especially for young Aboriginal people throughout the Northern Territory. The fact is when you can't hear at school, it is incredibly boring so you stop going, and when you don't go to school, you have all day in front of you and you've got to do something! That's when you get into trouble, sniff petrol, start stealing things and with the mandatory sentencing you end up going to jail. All this is because of the insufficient access to clean water and proper food.*

Employment

The right of access to employment opportunities is perhaps the most fundamental building block to regional development. Unemployment and socio-economic disadvantage is a major cause of poor rural health experiences and has a contributing effect on all the other rights I have touched on today. The right of access to employment opportunities without discrimination is set out in the *International Covenant on Economic, Social and Cultural Rights* and the International Labour Organisation *Convention 111*.

The National Rural Health Alliance Blueprint for Rural Development singles out employment as one of the most important things that need to be changed to avert the 'familiar downward spiral'. The Australian Catholic Social Welfare Commission has recently launched an excellent discussion paper on regional unemployment, calling for a national strategy of regional economic and employment development. It points out the persistence of levels of unemployment in many regional communities, which are many times the national average.

Economic and business services

Employment is dependent on the availability and affordability of necessary government and business services within a local community. Cuts in government services also lead to cuts in private sector services. As governments seek to use their diminishing resources more effectively they cut costs by closing services such as schools and hospitals which are deemed unviable as they do not have enough students or patients to justify their existence in monetary terms. This becomes a vicious cycle as rural populations are declining, which results in the closure of services, which in turn makes it more difficult to attract and maintain new populations.

Several government reports in Australia have shown that people living in isolated areas and in communities of less then 5,000 are especially affected by the lack of access to services. They can face a 'lack of information' about what is available; the absence or inaccessibility of many services; poorer quality services; higher costs associated with accessing services; inappropriate service and funding models that are developed for urban areas and poorly motivated staff.

The reduction in services to rural Australia also seriously affects the competitiveness and ultimate survival of rural businesses. Whether these are large beef or crop farms or the local post office, many businesses are affected by the changes facing rural communities. Yet the support of and investment in small business and industry in rural Australia are necessary to address the downward spiral of rural life. During our consultations people have spoken repeatedly about their concerns for telecommunications and banking services.

Telecommunications

As economic well-being becomes increasingly dependent on information technology, country people are becoming increasingly concerned about the poor quality and inadequacy of their access to telecommunications services. Good reliable telephone services and computer and internet access are vital to communities and particularly businesses that are struggling to compete with urban or major regional businesses. One man told us

> *If people who live in rural Australia are to be able to compete on the mythical level playing field they must be given equal access to communication services as their metropolitan based business people enjoy.*

Many submissions to the Commission have expressed concern that ordinary telephone lines in the country are inadequate and poorly maintained and that lines of a standard needed for fax or internet access are not only scarce but a distant and currently unsustainable luxury.

A recent article in *The Australian* newspaper stated that a growing number of rural businesses are beginning to rely on computer technology. Although beef farmers have been slow to take up the technology, over 50% of crop farmers now use computers in their businesses. On average one in three farm businesses currently use computers in the running of their business. So the issue of quality access lines is becoming very important. A man told us

> *Governments must acknowledge farming as a business in need of effective efficient communication services to function as part of the national economy. Farmers can't be competitive if they are deprived of adequate communication services, access to the Internet for information, weather forecasts and commodity price trends.*

And a man in Elong Elong in rural New South Wales wrote

The ability of people everywhere to do virtually everything is becoming more and more dependent on data communications. As we are, like many rural people, restricted to 2400 bits per second (bps) [that is, the speed that data travels over phone lines] or less, (which he explains later limits his computer capacity to sending and receiving very short E-mail messages) almost all Internet applications are unavailable to us. This includes many of Telstra's own services, and a rapidly increasing range of government and commercial services. For example, the Federal Government is developing a tender information service called Transigo in partnership with Telstra. This assumes a communications speed of 19200bps. Clearly, those businesses limited to 2400bps are being denied their rights. I have no views on the sale of Telstra. I have very strong views on the lack of data communications in rural areas

Banks

Many people in rural Australia have repeatedly raised major concerns about the reduction of banking services in their communities. Forty-five shires around Western Australia, for example, now have no direct access to a bank branch. The combined population of those shires is 89,000. This means that approximately 20% of the regional population of the state have no direct access to a bank. This situation is particularly serious given the size of this State, almost half the area of Australia. A large number of rural towns are at risk of being isolated from essential banking services.

The closure of bank branches also affects the viability of other services in the communities. When bank branches close people are forced to travel greater distances to access bank services. When people travel to larger centres they also conduct other business there, reducing the viability of other local businesses and service providers. This movement away from smaller centres puts the sustainability of those communities at even greater risk. It is another aspect of the "dying town syndrome".

The whole business of banking in the bush is undergoing radical change. The Australian Bankers' Association predicts that

> *bank branches will remain an important part of the banking scene but the number of branches will be reduced right around Australia. The more than 2,600 branches in rural Australia is too many to be sustained by a banking industry seeking to become more efficient, and then able to offer more extensive and higher value services.*

Hundreds of bank branches in rural Australia have closed in the last five years and many more are listed for closure. Governments, business and the banks themselves have scrambled to find alternatives. There have been increased numbers of automatic telling machines installed but these are not suitable for many people. Older people in particular are reluctant to use them and many people with disabilities simply cannot use them. The national government has piloted rural access centres that offer a number of different services, including banking and post office services, from a single site. The National Farmers Federation has called for greatly increased numbers of mobile banking services. But the most innovative response has been the development of a new form of banking in Australia, community banks. A small regional bank, the Bendigo Bank, has entered partnerships with local communities to establish these community banks. They are jointly owned by the Bendigo Bank and the local community and are now providing not only a local banking service but also a means for local people to ensure that their money is used locally, for investment in their own communities. These community banks began in two towns in western Victoria, Rupanyup and Minyip, in February 1998. They have been followed by perhaps another 20 or more and are now are being established in three Australian states.

Priority for human rights

Bush Talks teaches us that the basic human rights I have outlined - to education, to health, to work, to essential services and support - do not exist in isolation. They are connected to each other and to all elements which make up a decent quality of life.

The right to education, for example, is worth upholding not simply because it is an internationally recognised human right. It is the basic building block for economic, social and political development. Children in rural areas need to have an equal education to children in urban areas so that they have the same economic and social opportunities. They may even have a greater need for a quality education, as they will need greater creativity, skills and knowledge to cope with the challenge of unemployment and poverty facing rural Australia.

But education is not only about economic opportunities. It builds community and identity, provides students with the language tools to understand their own cultures and to respect and understand others who share their community. It gives them the tools to engage with the rest of Australia, to speak the language of the bureaucrats and the business people and to work to improve life in their community.

People in rural communities are well aware of this interconnectedness. It stares them in the face each day. In a small community small changes can have a ripple effect. Contradictions in government policy, social and economic change and the economically rational decisions of public and private sector leaders and managers all wreak havoc in perfect microcosm.

We were told numerous times of the potential effects of a business or service leaving a small country town. It may have an impact on the numbers of school teachers, local employment, local income and wealth, and of course the morale of the community. You cannot take away one service in a small rural community without it having an effect on many other services and ultimately on the most basic human rights of the residents.

The implications of this are clear and obvious. Human rights are as much a part of rural development and well-being as financial investment and physical and environmental infra-structure are. I am not only saying they *should* be as much a part. I am saying they inescapably *are* as much a part of rural development. Unless human rights are consciously promoted in rural development, they will be unconsciously violated.

Only when we start to give these fundamental building blocks of community well-being the same priority as economic issues will we avert the downward spiral of many regions and communities.

The right of rural communities to participate

My travels around Australia have taught me that no two country towns or communities are the same. So there is no single plan to meet the human rights needs of all rural communities. However, a few points made to me by country people again and again over the past two years have some direct relevance for how we might begin to restore and maintain viable rural communities. Not surprisingly, these points are also human rights issues, approaches embedded in human rights law and practice.

The first is that communities need to be involved at all levels of planning for and creating their own futures. This may seem obvious, but too often rural communities feel that they have been left out of the loop in decisions that directly affect them. For example, rural groups in Australia have been calling for rural impact assessments to be done on all legislation and policy changes for years now. Governments have begun to hear this cry, for sound political reasons: the bush is punishing political parties. Australia is a country with a tight two party political system. But over the last two years country independents have been elected in significant numbers in state elections in Queensland, New South Wales and Victoria. And in the last federal election in October 1998, Peter Andren, the independent in the rural Bathurst-Orange area of New South Wales, received the highest two-party preferred vote in the country. However, there is a long way to go before rural Australians feel that government responses to their concerns are more than tokenism. Local people themselves must own and run the development process.

This concern for participation is not only practical but also principled, required by human rights. People have the right to determine their own economic, social and political futures. This is a right recognised in both the foundational human rights covenants, the *International Covenant on Civil and Political Rights* and the *International Covenant on Economic, Social and Cultural Rights*.

There is certainly a lot of energy in rural and remote Australia which could be harnessed for change. Everywhere we went during our *Bush Talks* we came across people who love their small rural towns and communities, who, although saddened at the changes that may have happened and often seriously considering leaving town, are happy with where they live and are willing to fight to maintain the community.

They told us about many good initiatives undertaken by their communities to try to address some of the problems of isolation or declining services. People expressed interest in other communities and what they did, and how they too could do the same, whether in relation to health, the local school, young people and support or employment opportunities.

There is a willingness to work co-operatively and learn from other rural and remote communities, contrary to the stereotype of parochialism in rural areas. They want to see their regions develop, they want a confidence-building, integrated approach to planning and development and they want to be involved - to make the key decisions. That is their right.

The obligation of governments

However, the second point it is important to make is that, although small rural communities can be resilient and energetic, governments cannot absolve themselves of responsibility for them. Regions need participation, transparency and flexibility in decisions about priorities and plans for change but they also need outside assistance and resources to turn plans into realities. Rural communities pay taxes - they are entitled to as much support as urban communities.

The Australian Catholic Social Welfare Commission pointed to the need to move beyond the principle of 'do-it-yourself', which has the danger of being an excuse to abandon those most in need. That Commission has pointed out that we need to foster *more holistic and inclusive forms of regional development that recognise the national community's* ***collective*** *responsibility to share the opportunities, costs and benefits of economic reform and the role of governments to promote this interdependence through socially responsible and equitable policies.*

And this too is a human rights matter. Governments bear the ultimate responsibility to ensure that all human rights are protected and promoted for all people. They do not have to do everything themselves but they do bear the final obligation under international human rights treaties that they themselves are voluntarily entered and that they themselves have promised to observe. As I said earlier, these treaties represent solemn promises made by governments not merely to the international community but most importantly to their own people.

Human rights for human society

People in rural and remote Australia know that government responsibility is about more than national economic policies. A person in Molong, New South Wales, put succinctly what people told us time and time again. He said,

Governments must acknowledge the fact that people live in rural communities and need to be recognised as being a part of society rather than part of an economy.

We must assert anew that the economy exists to serve our society rather than our society being enslaved by economic ideologies. We must insist that the human rights of people in rural and remote communities are not forgotten but respected, protected and promoted.

That, as I said at the beginning, provides a paradigm shift in how we view the relationship between rural communities and others within a nation - governments, businesses, urban dwellers. It places the question of rural disadvantage and the promotion of rural well-being in a new framework - one of rights, not discretions. It requires that they become a priority for government. It means that the needs of country people cannot be ignored and their aspirations cannot be denied.

KEYNOTE ADDRESS
Seizing Alternatives: Ways of Knowing, Rural Research and Practice in the Helping Arts

Emilia Martínez-Brawley, USA

The Modern/Post-modern Discussion: Reviewing Where We Are

At a recent seminar on research methods and social inclusion in social work held at the University of Edinburgh, I presented a paper reviewing various postmodern approaches to social work research. In that paper, I emphasized interpretation and argued for renewing social work's commitment to good judgement as well as observation in doing research . I spoke about the growing body of what is broadly termed "postmodernist" literature that is becoming more and more apparent and useful in the social sciences (Martinez-Brawley, 2000). This literature primarily rejects the orthodoxy of the research and practice paradigms that have dominated the helping field in the past three or four decades, opening the door for other possibilities of researching, practicing and knowing. While some postmodern approaches have come under severe criticism by those brought up on a diet of rationality, neutrality, science and the values of the Enlightenment, many post-modern perspectives, including those I will to which I will primarily refer today, have made it possible for social scientist to question unitary doctrines and "Truths", including the monopoly of scientific views in the sociological disciplines. Most valuable is the fact that those post modern approaches emphasize the possibility of knowing in a multitude of ways (Irving,1999; Hartman,1994; Rosenau, 1992).

The broad philosophic discussion in which modernists and postmodernists engaged, and sometimes clashed, focused on "a war on totality and a disavowal of all encompassing single world views" (Giroux, 1995, p.ix). The core of the modern/post-modern debate in social work, for instance, centered on the question of whether social work knowledge proposed one single truth or many truths; whether a single world view, language, form of discourse or paradigm could dominate social work knowledge or whether there were many ways of knowing, practicing, conversing and exchanging. Of course, like in all debates, the issues are never as clear as can be described in a written analysis. However, beyond the many commentaries, polemics, points and counterpoints recently offered in professional books and journals, the question of one or many world views permeates the argument. Furthermore, the voices of many heterogeneous groups among those who practice and are served by social work, have transformed the discussion over world views into an issue that is essential to the survival of the profession. Post-modern approaches offer the opportunity of validating the contributions of women, of minorities and of other populations (such as rural populations) that have often been at the "fringes" of research (Martinez-Brawley and Zorita, 1998).

Postmodern approaches offer alternatives to the rigid paradigms social scientists borrowed from the hard sciences and mistakenly applied to the realm of human relations and social development. For if the knowledge of many helping professions such as community development, social work or education is to be helpful in real life situations, more than data manipulation is likely to be required. While the natural scientist's aim is to determine the regularity of events, to deal with the most predictable aspects of phenomena and to replicate them, the practitioner in human services or education or any other helping art must attend to what is less than regular, to what is unique in many unique contexts. For example, rural practice must deal with what is unique or germane to the rural or small town context, whether or not regularities among them can be identified. Furthermore, practitioners– whether urban or rural-- must also relate to the uniqueness of individuals (for example, unique ways of learning or the idiosyncratic aspects of culture or ethnicity, etc.) Attention to uniqueness— in the sense that the human condition is unique-- is the trademark of the helping professions and here I am including, among others, education, medicine, the ministry. If we ask, why are human services practitioners needed? The answer will frequently be because, simply put, we cannot help people by a formula in a manual; the artistry of relationships is still required. If we ask, why are teachers necessary --even in this age of technological global connections-- the response is likely to be because children learn in different ways and their uniqueness must be respected and nurtured.

Researchers in the helping professions or helping arts cannot hide behind the mask of the "lab" approach to knowing. It is clear that it is no longer sufficient to imitate the natural sciences in dissecting real life into its component parts, while manipulating variables. Through the years we have learned that in helping real people, the total is often more than the sum of its parts. The inert relationships we can often manipulate in artificial environments, may or may not reflect what is actually happening . Of course, on this point I am not alone but I am simply joining many distinguished social scientists who have eloquently argued on this matter (Barnes, 1977 & 1985; Gergen, 1994), for example, reminds us that "... in contrast to the mighty oaks of the natural sciences, one might describe the social sciences as a sprawling thicket." (Gergen, 1994, p. 3). In a sprawling thicket, as most ruralites will attest, judgement and interpretation become very important elements in navigating one's way.

My own local newspaper, always a better barometer of what is out there in front of the public than academic journals, recently reprinted a New York Times article reviewing practices in research dissemination (Cohen, 2000:A25). While the article's theme pivoted on the concern about the premature release of findings in social science and educational research, the fact that the public is questioning approaches that in the recent past would have been perceived as flawless. The article cited a number of popularly distributed "news" emanating from research and questioned the pervading belief in statistical manipulation as a source of dogma. In quite an amusing paragraph the journalist writes:

> Remember the Newsweek study that found that a 40 year old woman had a better chance of being killed by a terrorist than getting married? (Oops! A mistake in the statistical calculation.) Practically every week brings reports on what social scientists have to say on topics like who is going to cheat on a spouse, what will turn a child into a mini-Charles Manson or how the computer is turning people into lonely misanthropes. (Cohen, 2000, p. A25)

And for those who may feel the natural sciences were unfairly excluded, the article also mentioned that recently, NASA had "...announced that the apparent discovery in 1998 of a planet outside the solar system was wrong..." a big Ooops! for the naive or unquestioning mind.

Cohen's article did not go as far as I would have wanted it to go . (It is unlikely to find inquiry into "ways of knowing" in a daily newspaper!) However, the article did put in front of the public, some of the serious problems, if not the solutions, of the exclusive application of the ways of knowing we have cultivated until recently.

At the Edinburgh seminar I mentioned at the outset, there were many other scholars sharing a variety of viewpoints similar to the one I am presenting today. I was pleased to find that Professor Lorentz from the University of Cork, introduced an interesting reference which can add to our discussion here. He was speaking about the curiously postmodern approach to understanding in social work which he had found in one of Germany's social pedagogy pioneers. Professor Lorentz suggested that for Alice Solomon, (circa 1926) the most important aspect of social work research "... [was] not the amassing of data but their 'evaluation, comparison and interpretation' "(Lorentz, 2000, p. 4). For Solomon, stated Lorentz, "the subject of the social worker/ observer, [was] indeed not neutral." Prof. Lorentz suggested that Solomon's version of "subjectivity cum universality...[was] at one and the same time hopelessly dated and acutely modern." (Lorentz , 2000, p. 4)

The re-validation of thinking which goes beyond the mechanistic practices that have prevailed in the human services and educational professions, particularly in the US for the past three decades, can have important consequences for practice in very unique environments (Schon, 1983). A point of view which is more holistic and tuned to irregularities as well as regularities might better accommodate what practitioners face in social work, particularly in small town, rural or remote areas . As I reflected on the status of social work and social research in and about small community life and life-style, validating the subjectivity of the "observer/researcher" described by Professor Lorentz can open many new avenues.

Let me offer an example from social work. For years practitioners have searched, often in vain, for the common characteristics that make social work practice in rural areas congruent with practice in other more urban settings where social work was firmly established: the search was for the generalizations that would "validate" the practice. Yet, social workers in non-urban environments often found that some of the basic principles that their urban counterparts advocated for, were not relevant to their practice or research. They found that applying urban rules to rural settings was fraught with difficulties. "Objectivity" was a case in point. Perhaps, rural people were more motivated by personal attachments and responded better to individuals they knew and identified with than their urban counterparts. Practitioners also found that uses of space and time were more unique in rural settings, thus rendering urban "efficiency" measures less than useful. They found out that rural people related to concepts of space and geography differently. They also found out that in rural families social variables were differently defined and regarded. Kinship , for instance, meant something different in a small town, and thus, help or lack of help for a needy individual needed to be contextually understood. Different perspectives had to be used to judge what was normative or what was idiosyncratic. Furthermore, rural practitioners and scholars discovered that there could be no one single rural meta theory, because environments and circumstances differed . In the environment of rural practice, judgement and observation of individuals circumstances were by far more important than meta theories.

Finally, as rural environments become more and more heterogeneous in terms of ethnicity and cultures, ruralities discovered that they needed to search for understandings in very different ways and that the insights developed were also quite varied. Particularly but not exclusively in the U.S., cultural and racial heterogeneity determined the need for social workers to connect with those they served in very particular ways. African Americans, Latinos, Carribeans, Native Americans, recent Asian immigrants and a myriad of other groups did not always share the prevailing paradigms of *technical rationality*. For these groups the world was different, untidy, not value-free and objective but value laden and political. Their context and language referents were not those of the industrial northern European world. It was clear that no single "Truth" would be acceptable to the mosaic of races, cultures and traditions, sexual diversity and lifestyles.

Minority voices, often subjugated in the past, became more clear, stronger and articulate. While at times, in the not so distant past, these groups may have tried to move away from their own paradigms to fit the modern condition, what is happening politically, literally, and culturally in the world has put a stop to unquestioned adaptation. The spiritual and non-concrete characteristics of many ancient voices of native wisdom further underscored the necessity of understanding and validating other world views.

A New Look at Social Science Possibilities

In a recent work, Irving (1999) wrote:

> Until the 1960s the rule of science was a characteristic of modernity in academic life; however, since then there has been a trend , gradually establishing a region of postmodernism, that runs counter to a faith in a universal and objective scientific methodology. Since the publication of Thomas Kuhn's The Structure of the Scientific Revolutions (1962),most scholars have come to agree that science itself rests on assumptions that lie beyond scientific proof. 'In the humanities in recent years', writes historian George Marsden,'much of the most heralded scholarship has been directed toward attacking the assumptions that there should be one objective, scientifically based outlook on which all fair minded people should agree.' " (Irving,1999, p.30)

It is not the purpose of this presentation to attack any one paradigm. Rather, my goal is to introduce the idea that the one "objective, scientifically based outlook on which all fair minded people should agree" is no more. Changes in research epistemology encouraged by post-modernist thinking offer an opportunity for professionals in the rural field to construct their own theories Researchers and practitioners at the 'fringes' have the opportunity of building and asserting their views without apology. While at one time existing paradigms and world views precluded or invalidated different ways of looking at the world, revolutionary changes in the social sciences have done away with the need to apologize for or justify attention paid to uniqueness or differences. At least for intellectual discourse in the postmodernist world, the old games (often games of numbers only) for establishing standards have been unmasked.

I believe that rural practitioners whether in social work or education have been attempting to transform ways of knowing in the social sciences for a long time. For many decades they have been saying that theories validated in the cities— whether addressing the optimal size of schools, or the value of standardized testing, or the ways to approach social problems, or the direction of specializations in many helping professions, were not useful in non-urban environments. But the dominant world view denied the validity of their position. Generalizations were drawn from sampling and thus power was vested on existing theories. Ruralites were fighting a losing battle, where the cards were stacked against their unique points of view . As Kuhn (1962) had suggested, standards of rationality and the standards for the evaluation of paradigms were paradigm dependent themselves and the cards were stacked with the numbers. But postmodernist thinking has questioned those dominant standards. Feminists have done the same by transforming feminist inquiry, to study the world from feminist standpoints (McCarl Nielsen, 1990). A standpoint, writes McCarl Nielsen, is 'a position in society from which certain features of reality come into prominence and from which others are obscured' (1990, p. 24). Postmodernists have broken the ties that bound most social scientists to particular points of view.

In a study of Foucault, Chambon (1999) suggested that at junctures where "established ways of knowing are no longer helpful guides... we may find it comforting to step outside our tracks and confront shifting realities." (Chambon, 1999, p. 53). Chambon further suggests that

> ...transformative knowledge is disturbing by nature. It disturbs commonly acceptable ways of doing and disturbs the person implementing it. It ruffles the smoothness of our habits, rattles our certainties, disorganizes and reorganizes our understanding, shakes our complacency, unhinges us from secure mooring. It is serious and 'dangerous' work to take up... (Chambon,1999, p. 53)

Exploring Alternatives

Now, having suggested that rural social scientist and practitioners have opportunities for exploring alternatives in these post modern times, what is it that I propose they move beyond?

At the start of the new millennium, our culture has taken some seriously disturbing turns which ruralites, at least those I have talked to, have worried about. In the field of social services and also in education, the depersonalization of care and of educational practices in favor of routinized approaches to serve the many have been of concern. Let's consider, for example, some common practices in the field of education. Standardized testing, by its very nature, denies the possibility of success to students whose experiences and strengths are "outside the standard". Yet we know that standards are constructed based on the majority– in post modern terms, the most powerful-- and definitely do not focus on uniqueness. Standardization in anything, discourages the unique and nurtures only the average. Drawing another example from Arizona, in a language rich milieu, teachers are often discouraged from enhancing bilinguality in the classrooms simply because bilinguality as a cultural asset cannot be immediately measured. Educational practices force teachers to develop standard approaches which might be inappropriate for optimum learning in culturally diverse environments. In the name of quality, single standards that admit no variations and require little interpretation are applied. These standards become the "standpoints", which, as McCarl Nielsen suggested, permit only certain features to come into prominence while others are obscured. Yet, the dissatisfaction with educational services has resulted in a wave of home schooling and lack of confidence in educational institutions which historically had done a good job preparing individuals for new challenges. The risk of not looking for alternatives is that of throwing the baby out with the bath water.

In other helping professions, organizations have become large beyond control and have began to deny values which are generally desirable. For example, doctors are finding it hard to focus on healing patients as individuals; social workers have abandoned caring in favor of "managing" care; educators have moved away from teaching and learning in favor of managing classrooms. Yet, researchers seldom challenge these trends. The blind assumption is oftentimes that if it is the way of the many, and consequently, assumed to be not only good for all but intrinsically more valuable.

I have heard many teachers comment about their dissatisfaction with the "latest measure" of outcomes to which they have been subjected – not just in rural but in urban environments. Yet no one stops these practices often because individuals have been convinced they are the result of advanced scientific thinking, based on the perspectives of the many. Unable to claim large followings, ruralites often feel all the have is narratives to the contrary. Well, narratives have now been validated and ruralites have the responsibility to disseminating them.

If postmodernists have taught us anything it is that there are no single truths, that there are many valuable perspectives, that no one "reality" is intrinsically more "real" than another because the line between the subjective and the objective is very blurred. Often, what has been labeled "truth" are the established interpretations of phenomena.

Postmodern perspectives in the social sciences offer the opportunity of validating the unique contributions of those who think outside the paradigm. This is a rare opportunity for constructing a rural discourse that utilizes the varying perspectives or rural women, rural minorities and rural professionals of all types. The test of numbers might be useful in some instances but it is no longer the only arbiter of truth. What is important is the multi-faceted discourse itself and the judgement that should follow such discourse. Our basic guidelines should be the assertion of life enhancing-- as distinct from life denying-- values and practices.

So often, the first step to change is to establish a counter discourse that will lead to new interpretations. The examples above offer interesting arenas for the beginning of a rural counter discourse. But there are many others. Understanding the issue of quality of life has interested many diverse social scientists and humanists. The less quantifiable aspects of quality of life that have always concerned positivists can now be explored and validated through the new paradigms. Whether ways of interacting among people, or spirituality as an important dimension of quality of life, or sustainable agricultural practices that might not be economically efficient, or nostalgic and historical values can all enter the new rural discourse without apology. Recently, Flora (1993) suggested that "understanding the interactions that affect quality of life involves focusing on human values, economics, and political power. Values and power determine what is defined as quality of life and by whom." (in Bird and Ikerd, 1993, p. 96). The door is now open to research these issues not anticipating that a single truth will be found but eagerly searching for a dialogue of alternatives.
Postmodern conceptions have introduced doubt into our certainties. More fundamentally, they have introduced the potential for transformative work.

> Transformative work shows that the present is not natural and need not be taken as inevitable or absolute. Change can come from the realization of the precarious nature of established ways and by inviting the development of alternatives. This holds true for the client and for the worker, researcher and educator. We come close here to the definition of the role of the intellectual, as well as its limit:'The work of the intellectual... is fruitful in a certain way to describe that which-is by making it appear as something that might not be, or that might not be as it is'. (Chambon, 1999, p. 70)

Many of the premises we have painfully come to believe as the way of today are antithetical to rural values and concerns --- bigger is better; most technology is useful or all technology is equally useful; higher outputs automatically improve the quality of life; efficiency is a significant ingredient of life satisfaction for most people; spirituality is no longer valued; personal concern for fellow human beings is no longer possible; size and personalization must be sacrificed to progress, etc. Yet, few researchers or practitioners are challenging them, advocating against them, or even disregarding them. We are all too convinced that the battle has been lost and that the tools we have at our disposal are useless to "prove" that those premises are in error.

What the new ways of knowing permit us is to challenge these canons for they are only interpretations of a narrowly perceived reality. We can show that by "historicizing our understanding of reality by retracing how particular forms of knowledge have been created and adopted over time..." (Chambon, 1999, p. 78). The new ways of knowing permit us to bring the subjective close to the surface; not to distance ourselves from the object of study but to speak with the conviction of our experiences. Again, in the words of Chambon " [l]inking subjectivity to actions and knowledge" helps us "better understand how doing constitutes the doer..." (1999, p. 78). These new ways of knowing will permit ruralites to seize the authority of their own views, to study, judge and assess and validate understandings from rural "standpoints", and to mobilize us all for change. Forms of knowledge and practice must be perceived as permissible options with their systems of rules (Chambon, 1999). But the options and the rules can be modified and transgressed to create better, that is, more life enhancing realities.

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PAPER PRESENTATIONS

Native American Cybernetics: Indigenous Knowledge Resources In Information Technology

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Abstract

While it is common to see research on ethnobotany or ethnoastronomy, more technological domains are usually left unexamined. Yet Native American knowledge systems included many aspects of contemporary cybernetics. This paper examines the connections illustrated by computation in Ojibway scrolls, complexity concepts in traditional agriculture, and optimization in native coding practices. We will also look at the history of native coding in U.S. military cryptography, and native computing activities. Native American cybernetics spans both indigenous knowledge systems and the appropriation of new technologies, and has potential applications in both education and development.

The term "indigenous knowledge" is usually reserved for understanding of natural processes, such as ethnobotany or ethnomedicine. Yet Native American knowledge systems include many aspects of contemporary information technologies, and contemporary native communities have become increasingly adapt in appropriating computing and communication devices for their own use. I refer to this complex of practices as Native American cybernetics. The term "cybernetics" was coined by mathematician Norbert Wiener to describe his vision for a unified science of control, communication, and computation theory. Thus the term cybernetics is particularly appropriate for Native American technological practices, in which communication across natural and human domains have been so important.

Complexity and randomness in native knowledge systems

Figure 1 shows the startling variety of corn varieties created by indigenous horticultural practices. This is no anomaly; it is quite common to find strong support for sustaining and promoting biological diversity in native cultural practices. Hopi religious practices (Nabhan, 1983) for example involve the propagation of a rare bean variety which is sprouted during the winter in underground kivas, and a rare variety of sunflower, used to make the yellow ceremonial face-paint. South American healers (Cutler, 1944) conduct a ritual in which they propagate "podcorn," a variety that cannot be grown naturally because each kernel is covered by a heavy husk. By propagating rare and inedible species in conjunction with common and edible ones, native agricultural practices maintain an extremely diverse plant gene pool.

Why should Native American cultures have such a strong emphasis on maintaining a more complex set of genetic resources? From a biological point of view, these turn out to be crucial for coping with environmental uncertainty. Resistance against unpredictable drought, infection and pests can be obtained by cross-breeding with rare and inedible species, and maintaing biodiversity in general helps even hunter-gather economies. But rather than see this as a "more natural" way of living—a primitivising view that was promulgated by colonialists—we should be asking what this represents in terms of indigenous technology.

Consider, for example, traditional Native American gambling practices, such as the game of "dish" in which peach stones, blackened on one side, are tossed and the total numbers landing black side or brown side recorded as the outcome (figure 2). In several cases (Ascher, 1990, p. 93) we find that the odds calculated by probability theory match the odds given by traditional point scores for each outcome. In other words, "randomness" was not merely an informal concept: random tosses were precisely gauged in native gambling procedures.

This systematic relation between complexity and uncertainty is also evident in the myths of the trickster. In the Navajo story of creation for example (figure 3), first man and first woman carefully place shining bits of mica in the heavens, mapping out "the four bright stars at the four quarters of the sky" (the big dipper). But Coyote "scattered the remaining mica dust so it did not fall into exact patterns but scattered the sky with irregular patterns of brilliance" (Burland, 1968, p. 93).

This image in which people create order, symbolized by the carefully placed four stars, and nature creates randomness, symbolized by an irregular distribution, is not unusual. Much of native American designs maintain this four-fold symmetry (figure 4a). It is vividly illustrated in a 3 dimensional version for the northwest pacific dance rattle, used to ensure fishing success (figure 4b). Note that again, the natural distribution of the fish is visualized as a random spatial distribution, while humans impose a four-fold symmetry.

We can look at the concepts represented in these four different cultural domains—horticulture, games, myths, and geometric design—as expressing the same underlying mathematical principles (figure 5). In all cases the indigenous knowledge system represents a similar relationship between randomness and complexity. Contemporary mathematicians refer to this as algorithmic complexity theory, or the "Kolmogorov-Chaitin measure" in honor of the Russian and American mathematicians who first suggested it. Noting that some apparently random numbers can be completely determined by a simple algorithm, Kolmogorov and Chaitin proposed that the "algorithmic complexity" of a number was equal to the length of the shortest algorithm required to produce it. This means that periodic numbers (such as .121212121...) will always have a low algorithmic complexity. Even though the number is infinitely long, the algorithm can simply say "repeat 12 forever." A longer algorithm, like that required to produce Pi, would have a higher algorithmic complexity. Truly random numbers (e.g., a string of numbers produced by rolling dice) have the highest algorithmic complexity possible, since their only algorithm is the number itself -- for an infinite length, you get infinite complexity (figure 6).

From a mathematical point of view, this is why the Native American knowledge systems place a strong emphasis on maintaining biodiversity: Since algorithmic complexity increases with randomness, Coyote's random natural events can only be matched by the maximum in genetic resource complexity. But the parallels may be more than just analogy. Miguel Jiménez-Montaño (1984) published what several researchers have regarded as one of the most workable systems for measuring algorithmic complexity -- a system he developed at the University of Veracruz, Mexico for use on amino acids and genetic sequences. Jiménez-Montaño credits his PhD advisor, Werner Ebeling, as the main scientific inspiration for his research. But he was well-aware of the indigenous plant complexity, having been a long-time friend of Mario Vazquez, a distinguished botanist in the Biological Institute at the University of Veracruz who studies archaeological data on the plants used by the indigenous societies of Mexico. Although it may have been only a subliminal or indirect influence, it would not be too much of a stretch to think about Native American complexity concepts as one of the influences in Jimenez-Montano's work.

But the connections do not stop at the biocomplexity of native horticulture. Jiménez-Montaño's computational technique is based on finding a "context-free grammar," a set of symbol production rules, which would represent the minimal length algorithm for generating amino acid sequences. This too has parallels in native knowledge systems.

Computation in Ojibway scrolls

Figure 7 at top shows the diagram etched on a birch bark scroll by Ojibway shaman Sikassige, originally published in Hoffman (1891). The diagram shows four stages of initiation; a shaman's journey through the "path of life" (Dewney, p. 74). Each stage is represented as a lodge presided over by several officials; the number of these officials increase as the sequence 8, 12, 18, 24. Since 8 is not divisible by 3 and 18 is not divisible by 4, this sequence is not well explained by the idea of counting by multiples, as suggested by several anthropolgists. But the problem is not the lack of mathematical sophistication among the Ojibway; the problem is the lack of mathematical sophistication among the anthropologists. This numeric sequence is completely consistent as the result of a production rule generation system based on the groupings of the officials, as shown in figure 1 bottom.

The figures in Figure 8 (top), the Lac Court Oreilles scroll, appear to progress according to a production rule system that is specified by the posts inside each lodge (as shown in figure 3 bottom). The only exception is the final number in the last lodge, which is 25 by the production rule but only 20 in the scroll. The key to this difference may still be written in the symbols we have yet to understand.

Complexity and Communication: the Shannon-Weaver measure

Cybernetics includes mathematical measures for communication as well as computation, and again there are Native American counterparts. Shannon and Weaver defined the basic unit of information transmitted in a communication system in terms of probability. The less likely an event, the more information communicated by its symbol. This relation is precisely defined by Shannon and Weaver (figure 9a): each symbol of probability $\mathbf{p}$ contributes an amount of information in bits, $\mathbf{I = -log_2 p}$. To get the average number of bits per symbol (usually referred to as the entropy **H**) for a given communication system, we need only take the sum of $\mathbf{-pI}$ for each symbol. The maximum amount of information per symbol is obtained when all symbols are equally probable. More generally, we can see the relation between complexity and communication: the more complex the system, the greater amount of information it takes to convey its description. This leads quite easily to the concept of optimal coding, because you cannot use communication to gage complexity if some of the description is superfluous. Many Native American aphorisms regarding communication refer to this concept of optimal coding, or "saying much with few words," and it is often contrasted with the Euro-American tendency to be chatty or overly verbose (cf. Basso 1979).

Teachers interested in utilizing Native American knowlege systems in math education will find a rich resource in applications of information theory to indigenous coding practices. Calculations such as bits per message (entropy) or bits per second (channel capacity), for example, can be carried out for sign language, smoke signals, bead and feather patterns, sand paintings, and other Native communication media (cf. Mallery 1972, Witherspoon and Peterson, 1995 for Native American coding examples; Pierce, 1980 for an introduction to information theory).

Consider, for example, the Apache system (Mallery pp.538-9), where signals fall into three categories: "attention," "safety," and "caution"(figure 9b). Within each category it appears that distinctions can be made based on smoke column length, while the categories themselves are distinguished by the number of simultaneous fires (from one to three). Variation in column length is not entirely clear, but let's assume that there are two equally probable possibilities, intermittent versus continuous, and that attention signals are sent 55% of the time, safety signals are sent 30% of the time, and caution signals are sent 15% of the time. We can then calculate:

$$\mathbf{H} = -(\ 2((.55/2)\log_2 .55/2)) + 2((.30/2) \log_2 .30/2) + ((.15/2)\log_2 .15/2))) = 2.406$$

If lighting two fires takes twice as long as one, and three fires takes three times as long, what is the optimal assignment of number of fires to categories? Our intuition correctly tells us that optimal coding (maximum rate of information transmission) would require that the frequency of use of a symbol should be inversely proportionate to the speed of its signal, but let's confirm that mathematically. The information rate **R** is defined as the average number of bits per second for a given communication system, which is given by dividing **H** by the average number of signals per second. Using **f** for the number of seconds it takes to send the signal (create a fire and generate the smoke), we have six possibilities for the information rate:

$\mathbf{R}_1 = 2.406/(.55f + .30*2f + .15*3f) = 1.504/f$
$\mathbf{R}_2 = 2.406/(.55*f + .30*3f + .15*2f) = 1.375/f$
$\mathbf{R}_3 = 2.406/(.55*2f + .30*3f + .15*f) = 1.119/f$
$\mathbf{R}_4 = 2.406/(.55*3f + .30*f + .15*2f) = 1.070/f$
$\mathbf{R}_5 = 2.406/(.55*2f + .30f + .15*3f) = 1.008/f$
$\mathbf{R}_4 = 2.406/(.55*3f + .30*2f + .15*f) = 1.003/f$

Code $\mathbf{R}_1$ is optimal, and this is the same code assignments as that recorded for the Apache system: "attention" signals use one fire, "safety" signals two, and "caution" signals three. Their own reasoning for this choice may have combined the idea of frequency of use with some concept of the urgency of the message (the more fires, the more important the information), and perhaps even reducing error from false signal detection (three fires being the least likely to happen by accident), but all of these criteria would involve the concept of optimal coding.

Native American communication and the history of computing

Looking at Native American complexity concepts, we found ties to contemporary computation in the work of Jiménez-Montaño. Are there connections through communication as well? Modern computing begins with a synthesis between the kind of production rule generation theory discussed previously, and the engineering of machines for performing the required symbol manipulations. John von Neumann, who created the first synthesis, credited Alan Turing with having contributed the mathematical theory of computation required (see Hodges, 1983, p. 304). Turing was not only a theorist however, since the British government required him to work on cryptography in WWII; specifically cracking the codes produced by the German army's "enigma machine." While the German cryptographers were no match for Turing, they also failed to crack an American military information system: the Native American "code talkers."

This was not the first time Native Americans had been asked to provide U.S. military coding. Choctaw men relayed messages during World War I via field telephones in France, and 1940 the Army Signal Corps ran tests with Comanches from Michigan and Wisconsin. In WWII Choctaw, Kiowa, Winnebago, Creek and Seminole soldiers employed native languages to encrypt radio communications in Europe and North Africa. The most famous in WWII were the Navajo code talkers (Kawano, 1990); working together with army cryptographers they developed a complex system that included both alphabetic symbols as well as encrypted whole words. The creation of the Navajo codes, as well as the training techniques, combined indigenous knowledge systems with modern communication theory.

It would be absurd to simply state that Native American code talkers lead to the first computer -- any influence on the cryptography that Turing was involved in, and even Turning's influence on von Neumann, is diffuse and subtle. But it would be equally absurd to simply write them out of this history. The process of invention is always situated in the cross-currents of many different intellectual streams, and in the case of inventing the first computers, cryptography -- with all its cultural confluence -- is a part of that process.

WWII was not the end of this connection. At a reservation in Arizona, defense systems engineer Tom Ryan married into a Navajo family, and together with his father John Ryan, a Lockheed senior scientist, they began reflecting on the wartime coding effort -- if this kind of involvement was possible in war time, why not during peace? They began the Navajo Technologies Corporation, which combined training at the Navajo Community School in Birdsprings Arizona with several Department of Defense contracts for creating Ada compliers (Able, 1988). This was just one of what would later become an enormous number of links between Native American communties and computing. In Alaska, for example, environmental conditions promoted the early use of distance learning, and with home computers this resulted in the emergence of a widespread virtual community of indigenous people. The American Indian Computer Art Project (www.best.com/~jantypas/aicap/niiwin.html) features the work of indigenous artists who design in digital media, and even sells a digitizing stylus that is wrapped in traditional bead patterns (figure 10). A more general web site, Native Tech (http://www.lib.uconn.edu/NativeTech/), is "dedicated to disconnecting the term "primitive" from perceptions of native american technology and art."

Tribal websites and have now blossomed across the internet in a variety of forms, and some have started working in relation to technical projects ranging from linguistics to ethnomathematics. Native Seeds/SEARCH (/www3.ic.org/user/cmty/fic/cdir/res/NativeSeedsSEARCH.html), for example, a botannical organization dedicated to continuation of the indigenous plant stock, has been creating a "cultural memory bank" that will tie Native American farmers to their agricultural contributions. The concept, originating from Philippine ethnobotanist Virginia Nazarea-Sandoval (1996), documents the combination of cultural and biological information about the crops, seeds, farming, and utilization methods. The information, including video interviews, is stored on CD-ROM, with access controlled entirely by the indigenous farmers. Here we have come full circle, as the modern computer is used to help maintain the biogenetic complexity created by Native cultures.

Conclusion

While the math portion of ethnomathematics has seen an extraordinary wealth of creative yet rigorous frameworks -- an exploration of mathematical activity that has generated many new teaching resources -- the portrait of culture in ethnomathematics has received much less attention. In particular, the portraits of Native American "tradition" can imply a static, homogenous society lost in the distant past. Critiques of such frameworks have been a focus in anthropology for at least a decade (cf. Clifford, 1988).

This essay is an attempt to broaden the view of Native American ethnomathematics so that we can, when needed, see change as traditional, "authenticity" as a part of colonial politics, and the artificial worlds of mathematical technologies as a staging ground for sacred space.

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Rural Youth: The Policy Agenda

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Abstract

There is now a broad consensus that policies are required to generate "quality jobs" for young people in rural areas. This is an appealing agenda, not least due to its political relevance in addressing a range of rural problems, including the retention of the viability of rural communities. However, this paper argues that there are several difficulties with proposed policies to promote "quality jobs." Such proposals conflate separate issues into a single agenda, tending to identify the problems of young people with those of rural communities. They take insufficient account of the diversity of rural communities and the young people in them. The significant costs involved in redistributing resources and services to rural areas are not fully considered, and issues of "choice" tend to be misconceived.

Rural Youth: The Policy Agenda

The advent of a Scottish Parliament has raised expectations that issues with a Scottish dimension will be recognised and addressed by distinctive Scottish policies. The development of policies that address appropriately the rural dimension of Scottish life will testify to the vitality and impact of the new Parliament. However, given the political salience of this rural dimension, the new Scottish Executive may pursue policies for their popular and political appeal: policies simple to grasp and sweeping in intention, but at odds with the complex and often intractable character of rural issues. If so, the new political vitality in Holyrood may prove a mixed blessing, adding vigour to policy developments, but along paths that ultimately lead to frustration and disillusion.

The ground has already been prepared for this prospect through policies already emerging on rural issues in Scotland. Research studies reveal the complexity of rural "problems"; yet their results are interpreted in ways that simplify and generalise these "problems," so permitting production of potential "solutions." This is particularly plain in the case of research on "rural youth," where a consensus has emerged around policies to generate "quality jobs" in rural areas. The appeal of these policies lies in their simplicity and generality, but also in their political relevance in addressing a range of rural problems. Policies addressing the limited opportunities of young people can also be presented as a means of retaining the viability and restoring the vitality of rural communities.

The appeal of this agenda also lies in the dearth of policies focusing on rural youth - despite increasing reference to "a rural dimension" in policies on social inclusion. The Consultation Paper on social exclusion in Scotland (Scottish Office, 1998) acknowledged the problems of exclusion in rural and island communities. But policies proposed to promote inclusion (e.g. in education and housing) made no special reference to rural problems nor to young people in rural areas. The Scottish Office has expressed an intention to build "stronger communities" with a "sound" infrastructure, and "opportunities to find work, to learn, to shop or to have fun in the community" and also "good affordable links with other places where work and other opportunities can be found" (Scottish Office, 1999, pp. 7.1-7.3). This policy agenda may be relevant to rural communities but the link has only been made explicit in the context of transport, where funding is to be targeted at those living in rural areas if "viable alternatives to the car are frequently non-existent or inadequate" (Scottish Office, 1999 p. 7.13).

Following the introduction of a Minister and Parliamentary Committee for Rural Affairs, the rural dimension may feature more in policy making. (Fairley, 1999) There is already some evidence to this effect. Further cash injections for rural transport schemes across Scotland have been made to follow up a 1998 budget that allocated funding to subsidise public transport, to fund community transport projects and to help rural petrol stations to survive (Scottish Office, 1999; Scottish Executive Press Release 15/9/1999). The Rough Sleepers Initiative received funding to help rural local authorities develop a homelessness strategy, and Scottish Homes obtained £4m extra resources for rural areas (Scottish Executive Press Release, 24/9/1999). The "Remote and Rural Areas Resource Initiative" established in 1999, following the Chief Medical Officer's Acute Services Review, is receiving £2m a year and "will be responsible for sustaining and developing services to patients in rural and remote areas in Scotland." (Mauthner, 1999) The same year also saw the establishment of a new cross-cutting committee by the Minister for Rural Affairs in order to "mainstream" rural issues to give them priority in all aspects of Government policy (Scottish Office Press Release, 22/6/1999).

Nevertheless, initiatives as yet are typically of an isolated nature with an uncertain future - such as a pilot scheme taken forward by DfEE officials to meet educational transport costs of young people aged 16 –18 in rural areas (Cabinet Office, 2000). To date, few policies in Scotland (or the UK) directly aim to improve the living standards or prospects of young people in rural areas. Though the Scottish Youth Parliament has been formed to give youth have a policy input, the Parliament and the more local youth assemblies have an urban base, and are less accessible to youth living in remoter rural areas.

Most policies targeted at young people still neglect the fact that those in rural areas encounter specific problems. The Government's flagship programme, the New Deal, provides subsidised employment and training while promoting attainment of regular (unsubsidised) employment. Although in principle extended to the whole of Scotland, in practice the New Deal is limited in rural areas by lack of training and employment opportunities, regular or subsidised. Employment opportunities tend to be limited to low paid insecure jobs, and rural firms tend to be small, with a notable lack of training opportunities. Recent research (Cartmel & Furlong, 2000) found that rural employers were not well informed about the New Deal despite the heavy publicity through which it had been promoted. Many of the better informed were reluctant to participate due either to lack of in-house training or the inaccessibility of formal training courses. Opportunities are often limited by shortage of accessible housing and by transport problems. Moreover, the initial target population for the New Deal - the young long-term unemployed - is concentrated in the Scottish cities, with about one third of this population located in Glasgow alone (Fairley, 1998). Not surprisingly, Fairley (1998) found critics questioning the relevance to rural areas of a programme so plainly "urban in concept and design."

Proposals to enhance the prospects of rural youth through the promotion of employment and educational opportunities may fill this political vacuum. One aim is to extend opportunities for rural youngsters to acquire training and educational qualifications while staying within their communities. Another is to provide "quality jobs" to allow young people who left in search of better opportunities to return to their communities of origin. Proposals under this umbrella (Henderson & Rothe, 1997) include, for example:

- Promotion of subsidised training with rural employers
- Promotion of distance learning
- Financial support for travel and subsistence for rural youngsters attending training courses
- Decentralisation of public services
- Promotion of increased job training and career progression in rural employment
- Improved transport links to rural areas
- Promotion of self-employment in rural areas
- Improved access to housing for young people in rural areas
- Development of mentoring programmes to assist new company formation

Unlike the New Deal, with its focus on promoting employment opportunities without much regard to the quality of work on offer, such proposals directly address the issue of employment "quality" (Henderson & Rothe, 1997, p. 8) in rural areas. This agenda is informed by a landmark study stressing "the very real issues of lack of employment opportunities and affordable housing in rural Scotland in the 1990s" (Shucksmith et al., 1996, p. 480). The study highlighted the problem of "educating out," whereby rural parents seek educational opportunities for their youngsters outwith the immediate area, knowing that this will encourage them to leave their families and communities. Unless "educated out" young people in rural areas may have to reconcile themselves to a life of limited opportunities, circumscribed by the low level of available training and employment and exacerbated in many cases by lack of transport or access to housing. On the other hand, youth migration is perceived as a threat to rural communities, both undermining social support (exacerbating the social problems of an ageing community) and reducing social cohesion (threatening continuity of shared values and beliefs). Thus "respondents in all areas were anxious to develop mechanisms to retain young people in rural communities" (Shucksmith et al., 1996, p. 465).

Improving the supply of "quality jobs" in rural areas may help resolve the dilemmas facing rural families while simultaneously helping rural communities to retain their young people. Earlier research (based on the Scottish Young People's Survey) suggested that migration of young people from rural areas is associated mainly "with the lack of opportunity in the home area, particularly in terms of employment and education" (Jones, 1992, p. 37). Arguing that more young people would choose to remain in (or return to) their home area if given the choice, this study associated youth migration from rural areas with "constraint or at best of limited choice" (Jones, 1992, p. 37) or, more emphatically, with "lack of opportunity, reflecting constraint rather than choice" (Jones, 1992, p. 38). It was also argued that rural communities need to retain their youngsters:

> *The migration of young people from rural areas is a particular problem because they leave communities which consist increasingly of elderly people, who contribute only marginally to the local economy, but require a higher level of service provision. For communities to thrive, populations should be relatively stable and covering a range of age and economic activity* (Jones, 1992, p. 37)

It was suggested that young migrants often transferred their problems to an urban setting rather than resolving them, since many youngsters went on to experience problems in town. Though acknowledging the inclination of youngsters to seek a better life in the cities (whose streets are still imagined to be "paved with gold") this inclination was questioned, for "life in rural communities may seem dead-end to many, but is there any guarantee that town life is going to be better?" (Jones, 1992, p. 37).

The case regarding the need for "quality employment" in rural areas has been reinforced by research sponsored by the Joseph Rowntree Foundation "Action in Rural Areas" programme. Two recent studies emphasised the restricted opportunities for "quality jobs" available to young people in rural areas. They suggested that finding employment per se was not a particular problem, since long-term unemployment was rarer in rural labour markets and young people found themselves out of work no more often than their urban counterparts, while returning to employment more rapidly (Cartmel & Furlong, 2000). This faster flow out of unemployment reflected the vital role of local contacts in facilitating job search in rural areas. However, the jobs found were typically low paid, undemanding in terms of skill and lacking in promotion prospects or career structures (Pavis et al., 2000). This can mainly be attributed to the prevalence of small employers, offering few "quality jobs" and little in the way of formal training opportunities, beyond the minimum required for health and safety. Moreover, where young people were employed they often filled the most insecure positions (Cartmel & Furlong, 2000).

The lack of "quality jobs" in rural labour markets is perceived as a major problem, both for those remaining long-term (with no prospects of improvement) and for those wishing to return to their home communities after migrating to acquire better qualifications. Although research found that many students returned home for a period after graduation, this was mainly short-term, while they paid off debts and sought jobs in national labour markets. Meanwhile, those remaining in rural areas tended to experience problems in establishing independent homes, often remaining in the parental home for extended periods or relying on poor quality private rented sector accommodation in remoter areas. As rural employers also tended to be widely scattered, transport could be a serious problem in finding work. Even if available (and many parents helped with the costs of buying or running a car) employers could be reluctant to take on employees obliged to make long and complex journeys to work. If work was found, its low paid and insecure character often prevented young people from overcoming their problems with transport and housing (Cartmel & Furlong, 2000; Pavis et al., 2000).

Such findings have reinforced the case for promoting improvements in the quality of employment in rural areas. This focus on "quality jobs" at least provides a refreshing antidote to the Government's inclination to promote work as a path to welfare, regardless of quality. However, despite its merits in this respect, the case for promoting "quality" work in rural areas is less convincing than it appears, once due account is taken of the complexities and intractability of the problems that it claims to address.

Retaining young people in rural areas

One difficulty arises from the conflation of separate issues into a single agenda. The problems of young people tend to be identified with those of rural communities:

Lack of youth employment choice and options was perceived to be the most serious problem facing rural communities" (Henderson & Jones, 1997, p. 5).

Respondents in rural areas focus on the need to retain young people within them, and the provision of greater opportunities is conceived with this purpose in mind. Hence the concern to ally training opportunities with better chances of employment, lest young people use acquired skills and qualifications to seek jobs in national rather than local markets:

> A danger with promoting training opportunities is that, unless employment opportunities exist in rural areas, they may merely have the effect of increasing youth migration from rural areas. It is important that training and employment creation is a joint strategy" (Henderson & Rothe, 1997, p. 17).

However, the interests of young people may conflict with those of rural communities. Young people may be better served by provision of opportunities outwith rural areas. This may be on efficiency grounds - more educational opportunities can be created by expanding existing (urban) institutions than by creating new (rural) ones. It may be easier to reduce the problems young people encounter when migrating to urban areas - for example, through transport subsidies, housing allowances and the like - than to try to bring educational opportunities and jobs to rural areas.

It is doubtful that the problems of rural decline can be tackled through trying to retain young people who would otherwise migrate. One reason this seems attractive to rural communities lies in a concern with local tradition:

> Migration and retention were raised as major issues by respondents in the context of social change because for many respondents the strengths of any rural community lay in the people who lived and worked in the communities, and who adhered to a set of shared values and beliefs" (Shucksmith et al., 1996, p. 465)

This concern with change (and continuity) is evident in responses to the arrival of new migrants into rural areas. These migrants are often seen as a threat to rural traditions, with respondents "deeply concerned about the effect of the sheer volume of counterstream migrants on small rural communities" (Shucksmith et al., 1996, p. 465). The significance of inward migration in terms of economic activity (e.g. on spending capacity) or political vitality (e.g., through challenging deference) tends to be obscured by cultural perceptions of migrants as "incomers" disinterested in traditional rural life and work. By comparison, the retention of young people offers the prospect of preserving conventional rural values and leaving the slow pace of rural life undisturbed. Nevertheless, policies to improve the economic and social life of rural areas might be better directed at attracting inward migration of "incomers" than at trying to halt the outward migration of the young. If it is indeed the "socially limiting environment" of rural areas that young people find "daunting" then "Policies designed to preserve local communities, through the protection of traditional industry and festivals, may simply increase dissatisfaction among the young" (Jones & Jamieson, 1997).

Since access to employment in rural communities tends to depend strongly on the integration into "the network," those "not fitting in," perhaps because their parents are "incomers" or because their behaviour is disapproved of, can face significant barriers to economic and social integration (Furlong & Cartmel, 2000). Trying to retain traditional communities may do little to reduce the unequal opportunities they offer, notably to young women seeking employment. Hence "Policies designed for young people would not focus on retaining them in rural communities but would increase their scope for choice, and allow migrate-or-stay decisions to be based on viable alternatives" (Jones & Jamieson 1997).

This may conflict with the interests of rural communities in the retention of a young population. But it seems preferable to recognise such conflicts than to presume that policies can serve all interests at once.

Diversity

Another issue stems from the marked diversity of rural communities and their residents. As a recent report by the Cabinet Office (2000) acknowledged, "rural areas do not all share the same characteristics: some are prosperous, others are not; and some have better access to services, facilities and higher levels of employment than others" (p. 4). Though emphasising common "structural barriers," (Pavis et al., 2000) also note significant differences in employment levels, transport problems and housing problems, according to whether "rural areas" were isolated or close to urban centres, had high levels of seasonal employment or suffered from long-term industrial decline. Clearly there are marked differences in rural areas, depending on such factors as their remoteness from cities, their access to various forms of non-agricultural employment, their dependence on tourism, their proximity to educational and training establishments, and so on. These factors can have a significant impact on "rural" circumstances. For example, North Ayrshire, with its proximity to training and educational establishments and employment in Glasgow, retains a much larger proportion of young people than remoter parts of Scotland (Henderson & Rothe, 1997).

Variation is also marked amongst the target population of young people in rural areas. Pavis and others (2000) emphasised the importance of education and qualifications in differentiating between the young people in their study - with graduates orientated to national labour markets and those with low qualifications orientated to local employment. Although graduates may be obliged to look beyond local labour markets, it seems unlikely that this is entirely a function of the limited employment opportunities available there. Mobility for those with even modest career aspirations is also a common requirement for urban youth. Moreover, although Jones and Jamieson (1997) observed that migration does provide higher rewards for those with comparable education qualifications, they also found social factors influenced migration decisions, with "stayers" usually belonging to local families and migrants more likely to come from families with a history of migration. They also found that stayers or migrants varied in their degree of attachment to their home communities, with some migrants longing to return but some stayers also longing to leave. Thus enhanced provision of higher-level educational and employment opportunities in rural areas may be relevant mainly for well-qualified migrants who remain "attached" to their local communities. Provision for "detached" stayers might be more usefully focused on helping them to escape from their local communities.

Costs

If the problems of "educating out" are most severe in the remoter localities, so too are the problems of locating in them the requisite educational and employment infrastructure to prevent it.

Choices involve costs as well as benefits - requiring a trade-off between options, not all of which can be maximised at once (or we would not have to choose in the first place). Enhancement of the provision of "quality jobs" in rural areas is not a "no-cost" option, but one which may have negative consequences - for example, for the availability of opportunities outwith rural areas. What if educational and employment opportunities can only be improved through redistribution from urban areas – for example through the decentralisation of civil service jobs or educational institutions? Even policies to promote training and quality employment within rural communities have a price, in terms of resources that could be allocated in other ways. Should we be more concerned with facilitating the choices of those who wish to remain in rural communities, even at the expense of those who wish to migrate?

Even if such policies are desirable, this does not mean that they are feasible. If the limitations of rural employment are deep-rooted then the migration of young people is likely to prove an intractable problem. There are powerful factors that motivate industry to locate quality jobs in urban areas, including the availability of an established and substantial pool of skilled labour. Other considerations relate to transport and communications costs of locating in remoter areas. Some of these considerations may be removed by the advent of more sophisticated communications systems, including the Internet. This has already led to relocation of information processing work to rural areas - as, for example, the location of work processing of reports for New York professionals in Rothesey. However, while such examples hold out some hope for the redistribution of "quality" work from urban to rural settings, they also underline the force of the market in dictating location outcomes. In an era of increasing "globalisation" the power of public authorities to influence market movements is increasingly limited, not least because they also have to compete against each other.

Policies to improve "quality jobs" in rural areas therefore raise the question of costs, an issue significant when the level of services and provisions in rural areas is considered. In the area of health, for example, it is clear that "the direct costs of providing health care in rural areas are higher than in urban areas due to, amongst other factors, the lack of economies of scale, additional travel costs, high level of unproductive time, extra costs of providing mobile and outreach services and the extra costs of providing training and other support" (Roderick, 1999, p. 45).

Whilst resource allocation on a per capita base would obviously disadvantage rural areas, a sparsity weighting method is applied in the allocation of resources in Scotland and Wales (Roderick, 1999). Whether or not we agree on the method or its results, it is clear that arguments for giving "choice" to rural youth through enhancing "quality jobs" (and other services and provisions) have to consider potentially significant implications for resource distribution.

Choice

The case for enhancing "quality jobs" is often made in terms of giving young people "real" choices whether to remain or to migrate (or to return). Youngsters are perceived as "forced" to leave home, "often earlier than they would wish" (Highland Council, 1993, p. 3) in order to realise their educational ambitions and job aspirations. Those who migrate are denied a "real" choice to remain (or return). The young people staying in their home communities also suffer from restricted opportunities, in that they usually cannot choose "quality jobs." Hence the claim that "ideally, young people Should be able to choose whether or not to migrate away from their home communities, rather than to be forced to leave or stay. In order for young people to have such a choice, *structures for local employment and post-school education and training, as well as housing opportunities*, need to be in place" (Jones, 1997, pp. 7-8; emphasis added).

Offering "real" choice to young people through the creation of viable alternatives (and not simply aiming to retain them in rural communities) has become the central plank of research on young people in rural areas (Jones, 1999a; Jones, 1999b; Hendry et al., 1998; Jones & Jamieson, 1997; Shucksmith et al., 1996), also figuring in policy documents such as the Rural Audit of the Rural Group of Labour MPs (Murphy and Shucksmith, 1999). Since training in the absence of "quality jobs" might promote further migration, it has been argued that "an integrated approach to the retention of young people is required from policymakers if those who wish to remain are allowed that choice." (Shucksmith et al., 1996, p. 512). Moreover, young people are thought to require: "*support and guidance* in order to make "real" choices when confronted with the obvious tensions and dilemmas associated with the stay-or-migrate decision that all young people living in rural areas must recognise and face." (Hendry et al., 1998, p. 5.1.2; own emphasis). Thus public policy is exhorted not only to create choice, but also to provide professional advice (e.g., through careers guidance) to help young people to exercise it.

The concept of "real choice" is appealing. Who would want to deny young people the choice of whether to remain in or leave their home community - urban or rural? We are generally inclined to regard choice as positive and restriction of choice as unreasonable. But on closer scrutiny the concept of "real choice" (whether to remain or migrate) is problematic.

There is the difficulty of how such "choices" could be exercised, for they are complicated by the problem of ignorance – of balancing the "benefits and burdens of the life and opportunities already known" against the (unknown) "benefits and burdens of a life and opportunities to be explored." The exercise of "choice" is also complicated by influence, since young people are not immune to the influence of powerful others with a vested interest in whether they stay or go.

Although "real choice" has been presented as the ideal, its conceptualisation has remained vague and inconsistent. At least three components have been evoked, with different emphases. First, it has been conceptualised in negative terms, as not being "forced" to leave or to stay (Jones, 1997, p. 7). Second, a positive conceptualisation has been "the ability to choose whether or not to migrate away from the home community" (Shucksmith et al.,1996; Jones, 1997). Third, "real choice" has been interpreted simply as "increasing access to opportunities" (Jones, 1999; Jones & Jamieson, 1997; Rural Audit, 1999) including local education and training; wider labour markets; transport; child care and information.

But the idea that young people are "forced" to migrate or stay is problematic. Who or what is "forcing" whom? Is this force intended or unintended? The term "force" is ambiguous, since it can refer to social constraints but also has connotations of deliberate action and even violence. Residents of rural areas are sometimes inclined to "blame" the problems of young people (for example in finding affordable housing) on "incomers" who (by raising the price of local accommodation) can "force" young people out of the housing market. However, we need to be wary of this kind of over-simplification. Since we are always subject to social constraints, we also need to consider whether, when and why these ought to be challenged. It is never obvious - in the age of globalisation - which constraints we should challenge, and which we should accept as a framework for our actions. The existence of constraints does not in itself establish a case for trying to reduce or remove them.

To adapt a well-worn aphorism, one person's constraint is another person's opportunity. Even if migration is "associated" (Jones, 1992, p. 37) with a lack of educational and employment options in rural areas, this "constraint" may be perceived in positive rather than negative terms. Thus the research evidence suggests that residents in rural communities tend to perceive migration as "forced" while young people themselves are often very positive about their experiences of migration, and find attractions in an urban lifestyle (Shucksmith et al.,1996; Henderson & Jones, 1997).

The argument that young people are "forced" to migrate is also suspect on empirical grounds. The Scottish Young People's Survey carried out in the late "80s revealed that

> young people who were living in rural areas were more than twice as likely to have left home as those living in the major towns. [_] By the age of 19 years, 54% of people who had been living in remote areas at age 17 had left home (though some had returned again). This figure compares with 32% of 19-year-olds living in other rural areas, and 25% of those living in towns." (Jones, 1992, p. 37).

While leaving home was notably more common amongst young people in remoter rural areas than in major towns, it was only marginally so amongst those in other rural districts. More young people in rural areas left home to continue their education (55% compared to 44% in the major towns) but this hardly justifies any strong conclusion regarding the "force" of restricted opportunities in rural areas.

Thus the question of whether young people are "forced" to leave (or stay) is more complex and ambiguous than the "real choice" agenda allows.

What of "real choice" in terms of choosing whether to stay or leave? This implies that choice involves a rational assessment of what opportunities are like at home, compared to those elsewhere. However, there are always pressures that encourage people to act one way rather than another. For example, Henderson and Jones observe that "more is done (through education and social pressures) to encourage young people to leave rural areas, than was done to encourage them to stay" (1997, p. 3). And apart from economic reasons for migration, there are other important considerations, including degree of attachment to the local community, family history, parental influence, and the location of the extended family (Jones, 1992; Jones, 1999b; Jones & Jamieson, 1997; Shucksmith et al., 1996).

Extending choice is therefore likely to be a more complex and difficult exercise than any simple equation of greater "real choice" with increased opportunities implies. But if "real choice" is equated with opportunities, why invoke the concept of choice in the first place?

Values

The "real choice" argument tends to rely upon an unacknowledged and questionable value assumption - that young people should choose to remain in their home communities. This has been defended (Jones, 1992) on the grounds that the interests of young people themselves may be best served by remaining at home (given the risks associated with migration).

However, a case can be made to encourage young people to leave and explore new possibilities beyond their own community. Leaving home, at least for a period, may mark an important step in the transition from youth to adulthood, aiding the process of emancipation from parental authority. Not to embark on such a venture may mean a missed opportunity at an age when "experimenting" should be part of the experience. This view seems prevalent amongst young people themselves, since younger respondents "generally viewed their time in urban areas as extremely beneficial" (Shucksmith et al., 1996, p. 467) offering opportunities to experiment with youth and urban lifestyles.

It has also been pointed out that local employers value the experience young people have gained outside their local communities, which can increase their chances for employment on their return (Henderson & Jones, 1997). Evidence also suggests that those returning to rural communities after a period away are more likely to be balanced and tolerant in their attitudes (Shucksmith et al., 1996). A case can therefore be made for giving priority to migration over staying at home.

Policy principles

The "real choice" argument does not offer explicit principles on which to base claims for increasing resources for rural areas in general, and rural youth in particular.

If the concept of choice is difficult to interpret, we may call upon other principles to inform policy. But it is not clear what these principles should be. Is the underlying concern about meeting young people's needs? About greater equity between rural and urban youth? Is "real choice" a rights-based notion? Is it related to concepts of social justice? Such principles are conventionally invoked when the distribution of resources is discussed (Taylor-Gooby, 1998; Manning, 1998) and might be relevant to arguments about "real choice" for rural youth - but no explicit links have been made.

Suppose we invoke the principle of meeting needs. One problem here is that the needs of young people are not confined to rural settings. For example, mobility may be vital for any young people with modest ambitions, not just for those in rural areas. Many urban young people live in areas where unemployment is very high, and where there are few social provisions. The latest research suggests that geographical location is less significant in shaping the experience of young people than other factors, such as gender or education (Pavis et al., 2000). Policies designed to address the "needs" of young people in general, or to focus on the needs of young people suffering particular forms of disadvantage (such as lack of qualifications) may therefore be more appropriate than trying to address the needs of young people in rural areas.

Another principle, based on considerations of equity, implies that opportunities for young people in rural areas should be comparable to those in urban areas. But this would hardly be feasible without eroding entirely the social and economic differences between rural and urban areas. The issue of equity is also complicated by the problem of isolating particular factors, though quality of life is experienced as a whole and not in terms of particular circumstances. Rural residents themselves subscribe to this more holistic conception of the balance of advantage and disadvantage of rural living:
"...respondents very much saw the disadvantages and advantages as being an issue of balance, and they were prepared to accept some disadvantages as long as the balance was in favour of the advantages" (Chapman & Shucksmith, 1996, p. 73).

Thus rural residents tended to discount the lack of opportunities in terms of employment and income generation, and offset problems of transport and work, against other virtues of living in a rural setting:

> by (these) objective standards the respondents in the study could be seen as being disadvantaged because to a large extent they were unable to share in the lifestyles of the majority of the population. And yet what was found was that for the most part respondents considered themselves to be advantaged by rural life rather than disadvantaged, because of the higher quality of life available to them, in terms of the social and moral environment, a lack of crime, neighbourliness, and so on (Chapman & Shucksmith, 1996, p. 74).

To focus selectively on particular factors such as income or employment may distort the overall balance of advantage and disadvantage associated with rural or urban styles of life.

Arguments for increased opportunities for young people in rural areas could also appeal to minimum standards. This raises two questions. First, what level of social provisions (such as education, health, housing, employment, and leisure) should people enjoy in a given society? To make a case for rural provision we would have to establish a baseline and show that rural communities fall below it. Second, what provisions above that baseline should be available in all areas of a given society, and what criteria should determine the location of provisions, such as hospitals and institutions of higher education? We also have to consider the extent to which public intervention should try to alter the geographical distribution of resources (such as employment) established through the operation of the market.

It may be possible to construct a more coherent case for enhancing the opportunities for youth in rural areas by considering the provisions they lack, such as access to local employment, post-school education, training, housing and leisure. All these fulfil basic needs, and not being able to meet these can be said to indicate deprivation of some kind. Issues of lack of employment, education and housing led to the establishment of the Commission on Social Justice in December 1992, set up by John Smith, then leader of the Labour Party. The Report of the Commission stressed "the need to spread opportunities and life chances as widely as possible" at a time when "old evils of homelessness and pauperism have returned" (Commission of Social Justice, 1994, pp. 1-2). However, as a recent workshop on Rural Deprivation reinforced (at The Sixth Circumpolar Universities Co-operation Conference, Aberdeen, 24 - 27 June 1999), concepts such as "deprivation" and "poverty" are relative, and what they mean in practice is controversial. Often, residents in local areas consider themselves reasonably well off (at least compared to others even less well off), and it is professionals who label these people as living "in poverty" (Shucksmith, et al., 1996).

However, poverty does not have to be understood as a purely relative concept. Re-visiting the poverty debate can be instructive in showing us a possible "absolute" aspect of poverty. The concept of "achieving minimum capabilities" has been used by Sen to argue that "the poor, relatively speaking, are in some sense absolutely deprived" (Sen, 1983, p. 168) and

> Poverty is not just a matter of being relatively poorer than others in the society, but of not having some basic opportunities of material well-being - the failure to have certain minimum "capabilities." The criteria of minimum capabilities are "absolute" not in the sense that they must not vary from society to society over time, but people's deprivations are judged absolutely, and not simply in comparison with the deprivation of others in that society (Sen, 1985, pp. 669-70).

If people are seen as deprived because they are homeless, whether or not other people are homeless cannot alter this judgement.

Sen goes on to distinguish between "commodities" and "capabilities." Take the example of a bicycle as a commodity. It has several characteristics, one of which is transportation. A bike provides a person with the capability of moving in a certain way. Sen (1983) argues that it is "the capability to function which comes closest to the notion of standard of living" (p.160). Commodity ownership tells us nothing about what a person can do, or cannot do (Sen, 1983). Persons with a disability may not be able to use a bike, and for them to be mobile, other forms of transport must be available if we want to ensure that they enjoy similar capabilities, and therefore a similar living standard, as those without a disability. Thus "having a bike may provide the basis for the contribution to the standard of living, but it is not in itself a constituent part of that standard" (Sen, 1983, p. 160). It follows that poverty is an absolute notion in the space of capabilities, but is relative "in the space of commodities, resources and incomes in dealing with some important capabilities, such as avoiding shame from failure to meet social conventions, participating in social activities, and retaining self-respect" (Sen, 1983, p. 168).

We can consider opportunities for rural (and urban) youth through the principle of "achieving minimum capabilities." Here the question arises whether the ability to locate in a geographical area of one's choice is indeed a "minimum capability" that ought to be ensured by society. We might well regard any interference with choice of location through legal restriction or force (such as the kind notoriously used in the Highland clearances) as an intolerable infringement of freedom. Few would disagree that people should be "free" in this sense to choose where to live. But this does not establish an obligation on others to make such choices "free" from costs or constraints. To do so, we would have to establish the importance of realising this capability, just as we might argue that communications skills are essential for participation in society. It is not at clear, however, that ability to locate in a particular place (one's community of origin) can be advocated on these grounds, particularly when that home community is itself located within a highly mobile and integrated society. Indeed, there seems something rather odd about any suggestions that one should be able to stay at home but still enjoy all the wider benefits and opportunities associated with not doing so.

There are other more serious contenders as minimum capabilities - mobility, communication, creativity, self-respect - that may be restricted if commodities such as transport, education or employment are unavailable or inaccessible. In these cases, we may more readily accept an obligation not merely to establish (negative) freedom from interference but also positively to provide resources to allow people to realise their capabilities. It seems more compelling to meet needs for education or jobs because without them such capabilities as communication cannot be realised, than to base these claims on the capability of choosing geographical location.

Conclusion

The case for extending "real choice" to young people in rural areas through encouraging the creation of "quality jobs" is undoubtedly an appealing one, but it takes insufficient account of complexities and potential costs. It is not enough to identify the "needs" of rural youth and then assume that these should be met.

In any case, the "needs" identified by research are less clear-cut than at first appears. The problems of rural communities and of young people in those communities can easily be confused. It is important to distinguish the case for retaining young people in rural areas from that of extending their options to remain or migrate. The case for retention is pressed most by rural residents, but primarily on grounds of cultural continuity. We should recognise that the interests of residents may conflict with those of young people. We should also recognise that policies to bring "quality jobs" to rural areas may prove expensive and ineffective given the force of countervailing social and economic factors. The diversity of rural areas has to be taken into account, since those remote areas most disadvantaged by isolation are also those where these obstacles are most severe. The diversity of young people in rural areas is also a factor, since it is mainly those who have acquired good qualifications through migration and desire to return to their "home communities" who stand to gain from policies to relocate "quality jobs." Whether meeting this desire should be accepted as a policy priority is a moot point.

The complexities we have discussed relate not only to the diversity of rural contexts and populations, but also to the problems of disentangling issues and establishing clearer policy agendas. The argument for "real choice" has become an important policy premise but one which lacks clarity and consistency. The interpretations of "real choice," in terms of not "forcing" young people to migrate, or giving them a "choice" to stay or go, are of questionable merit. The underlying value position - that young people should choose to remain in rural areas - seems plausible but is nonetheless contestable. We explored different policy principles to which one might appeal - needs, equity and minimum capabilities - and in each case found reasons to question the case for extending the choice of location made by rural youth.

To close this paper on a more positive note, we suggest that attention should shift from choice of location to concern with realising minimum capabilities (mobility, shelter, communication) and the related case for meeting the educational and other needs of young people generally. This does not exclude a rural dimension, since capabilities can only be realised through variations in the commodities requisite for their attainment. However, the provision of training and employment opportunities to young people based on these criteria would be orientated to enhancing minimum capabilities rather than extending choice with respect to migration. This would involve a sharper focus on those young people who lose out most in the struggle to realise their potential - notably those young people remaining in rural areas with transport problems, without educational qualifications, lacking access to adequate housing, and trapped in insecure employment. The aim would be to reduce or remove these barriers to realising their capabilities rather than changing their options regarding migration.

Separating the problems of rural youth from those of rural communities allows a more positive agenda to emerge regarding the latter, as a more broadly-based approach can be pursued. This could involve a much more positive perspective on inward migration of "incomers" and their capacity to sustain rural economies and services. This might be less ambitious but more attainable than the ambition to retain rural youth, since inward migrants are often prepared to trade educational and employment opportunities for other qualities associated with rural life. It might also be more ambitious, in that inward migration is likely to challenge the slow pace and comfortable conventions characteristic of many (but not all) rural communities.

Finally, we would like to rescue the issue of "quality jobs" from its entanglement with that of migration. The emphasis on the quality of opportunities is surely a marked improvement on current inclination on the part of New Labour to regard work of any sort as a panacea. Steps to improve the income and security that can be derived from work are much needed, though this need applies to urban as to rural employment, and can surely be tackled best through measures to enforce minimum standards (such as a more vigorously pursued minimum wage policy) rather than by chasing a chimera in the form of reduced migration.

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Teachers' Thinking And Planning In The Subject Of Social Studies In Small Non-Graded Schools In Norway

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Abstract

This is a research about teachers' thinking and planning in Social Studies at early secondary level in small multi-aged rural schools in Norway. The teachers' thinking and planning in such school environments are examined, to get an understanding of how they teach the subject in itself, but also of what seems to stand out as special qualities in such school environments and what must be common to all school settings. The topic focused on, in six case studies, is in the national curriculum named "The human being in meeting with society". The themes in the national curriculum are obligatory themes for teaching in primary schools in Norway. The researcher takes part in four lessons in that topic, lasting from one hour to one day, and after that the teacher is interviewed about how they understand what happened and how they see that as a part of the bigger school context.
The nature of knowledge is seen according to the formal and practical kind of knowledge we proceed to in our society, and refers to Gary Fenstermacher's (1994) epistemological analysis of teachers' thinking. The teachers' arguments are seen from a retrospective point of view, a kind of reconstructed logic (Pendlebury 1990). The main research question is: What sources of knowledge do the teachers build their thinking and planning upon? The teachers' practical arguments are understood through Alfred Schutz'(1970, 1982) phenomenological/ sociological perspectives combined with an hermeneutical analysis. The reference scheme is the common didactical activity structures as we know them in pedagogical literature and teacher education. These reference schemes are analyzed according to coded activity structures and activity segments.

I partly teach in teacher education at Nesna College in Norway and I partly am a research fellow at the University of Trondheim, working on what shall be my thesis for a doctor's degree. Before entering teacher education 12 years ago, I was a primary school teacher myself. My research deals with teachers' thinking and planning in the subject of Social Studies in non-graded classes in small rural schools in Norway. Approximately 43% of the schools in Norway are non-graded schools. The children of the classes in my research project are from eleven to thirteen years old. The topic I am focussing on is a compulsory topic in the national curriculum called "The human being in meeting with society." This theme is more exactly operationalized as: to work with ordinarily accepted norms and rules for how to behave, being together and cooperate in society, to work with matters that are of importance for interaction between people in different roles, and to examine how society has been arranged to fill the needs we have. I have analyzed five case studies so far, and I have one case study left.

Through my research I want to understand teaching in such schools and compare it with both the kind of knowledge we try to give the students during their teacher education and the nature of knowledge we produce in our society. In accordance with Fenstermacher (1994), I regard the epistemology or theory of knowledge as being divided into practical and formal knowledge. These two kinds of knowledge are seen as distinct but interdependent. That means that I, through practical arguments, try to understand practical as well as formal aspects of teachers' knowledge. The teachers' arguments are seen from a retrospective point of view, as a kind of reconstructed logic, as Pendlebury (1990) calls it.

I took part in four lessons, one for each of the teachers, of the subject. The lessons lasted from one hour to one day. After studying the schedules and becoming accustomed to the environment, I took part in each lesson and interviewed the teacher afterwards, about her intentions, how she understood what happened and how she saw that as a part of the whole context she acted in. All teachers were female.

My main question is: "What are the sources that teachers base their thinking and planning on?" The supporting questions are: "On what knowledge base does the teacher try to make teaching valid for the student?", "What does teaching in such schools tell us about teaching generally?" and "How can we understand the teachers' knowledge in an epistemological perspective?"

My work is built on Alfred Schutz' (1970, 1982) phenomenological/ sociological perspectives. I combine a phenomenological understanding with a hermeneutic analysis. In agreement to what are my perspectives on good teaching, I am trying to identify the teacher's understanding of the instructional patterns in their contextual framework. The teacher's thinking and planning is analyzed in accordance with some main goals in child education. The reference scheme are didactical activity structures, agendas, and purposes that are common in pedagogical literature and teacher education in Norway.

The teacher's thinking and planning is analyzed with the help of Bjørndal and Lieberg's model of didactical analysis (1978). This model sees teaching relations such as content, purpose of teaching, teaching activities, and evaluation as a connected whole. As we think of didactical structures in Norway and as Schutz explains it, teaching has its social forms, its ideal cultural objects or "referential scheme". These forms, which develop in each teaching context, have their own action patterns. The action patterns which are contingent to each teacher's thinking and planning and how she explains that in "in-order-to motives" and in "because-of motives" are analyzed according to activity structures and coded activity segments, such as pacing, which, according to Stodolsky (1988), indicates who sets the rate of work during a segment, student location, option, feedback, teacher role, cognitive level, social objectives, needed skills, expected student interaction, student behavior, and student involvement.

The teachers' understanding of those action patterns are analyzed in a phenomenological perspective regarding their aspects of practical and formal knowledge. After analyzing the activity segments, I can hermeneutically understand the action patterns of the teachers' thinking and planning, how they planned the teaching and how it was carried out in a contextual framework.

In this paper I will present the three main points that determine the value of teaching for the students:

- Teachers do not cope easily with all the important dimensions of teaching at once.
- Focusing on some dimensions of teaching seems to be part of the whole school environment and makes the schools quite different.
- What are the special qualities of those schools, and how can they be strengthened.

I will furthermore briefly discuss the last supporting question: "How can we understand the teachers' knowledge in an epistemological perspective."

Teachers do not cope easily with all the important dimensions of teaching at a time

In my research I have experienced that a single dimension of teaching is often focused upon, and other dimensions are consequently neglected. When one dimension has a strong priority as an important aspect of the teacher's thinking, this influences the whole situation. It creates "action patterns" (Schutz 1967, 1970) that influence the whole system and the possibilities of utilizing other supporting dimensions. This also easily makes the teaching teacher-directed, even when the social interaction between teacher and students is well-suited for more complex teaching methods.

Some teachers tend to concentrate on interacting with the students, without working on the development of a clear structure of how to cope with each other and interact during the Social Studies lessons. The focus on value clarification, for instance the cognitive dimension of teaching, supporting the students to think on their own, is a very important dimension of teaching, but it can be overestimated. Ozer (1992), points out that disclosure of personal values and concepts can be really perplexing for people, but it does not necessarily affect their stereotypes.

Because there are only few students it can easily be assumed that the social climate is created through interactional patterns which are a continuation of the daily action patterns in the home environments. On the other hand, where many people work together it seems necessary to structure the settings and the learning of how to deal with each other.

For instance, one of the teachers I interviewed organized a group discussion with eight students about the rules of how to behave in the classroom. She wanted to let them all come with their opinions and discuss the norms and rules together before she continued the discussion together with them, trying to reach an agreement on the most important rules. When she lead the discussion, she tried to get everybody involved. But during the students' discussion on their own, only some of them were heard. Instructing the students, she did not make it clear who should be the leader of the group, how they should ensure that all who wanted to say something were listened to, and what they should learn as the social aspect of working together. Then, of course, some of the students dominated the discussion and left others behind. The teacher also struggled to create order for getting the students' suggestions for classroom rules. Sometimes the students waited for their turn to speak, at other times two ore more were speaking at the same time. This teacher wanted to have the students' voices in the matter, but unclear structure of the work also made the students' voices unclear. The teacher did not feel that this was a good situation. She nevertheless argued that it was very important to listen to the students. They are the next ones to rule this society, she argued.

Another teacher one-sidedly focused on pacing the students' work. This made the teaching rather technical, although she tried to have a dialogue with the students during their work. She declared, for instance, that she did not like drama activities, arguing that she found such activities ineffective. There was a calm atmosphere in the classroom, but an atmosphere more characterized by the children obeying the teacher than cooperating with her. Many of the students though, especially some of the girls, worked very well. These girls, answering questions and discussing subject matters, also acted on a high cognitive level. Other students' cognitive engagement and work involvement, however, was on a much lower level. Especially one boy was unable to fulfill the demands of work.

A third teacher combined the interactive dimension between teacher and students with clear demands according to how to communicate and create a good atmosphere in the classroom. She herself acted as a good example for the students, by, for instance, hugging them, appraising their work, telling jokes. She created a quite relaxed and happily sharing atmosphere. The communication level between teacher and students, combined with clear demands, led to learning many social and factual concepts, although the work of the students should have been structured more intentionally. The students seemed familiar with working in groups, but not to project-work in groups. The teacher was not familiar with this last method well enough to ensure that the students could manage to structure their work, or, in other words, she had not gradually taught them the necessary structures for this kind of work. When they had a project-work together in groups, they had trouble, even though two teachers were supervising three groups of four to five students.

Project-oriented work, as it is defined as a compulsory working method in our national curriculum, especially requires that the students have learned some activity structures. Project work, according to the national curriculum, shall primarily be done in cooperative groups. The meaning of project here is not only seen in the sense of reform pedagogics, but also, more specifically, as a teaching method. To manage such an activity format, the students must be familiar with some specific action patterns. The students must have learned to form group processes, to distribute roles and tasks in the group, to define the goals of their work, to set up a working plan, and to write a log or notes of reflection, to accept that each member of the group cannot work at the same level, to tolerate and help each other, to seriously evaluate and give each other constructive feedback, and so on. Then they can more easily take responsibility for their work. They have to gradually respond to "action patterns" and learn to work on their own. They must also learn to be aware of the social aspects of the work, to evaluate those aspects, and to learn from their experiences.

A fourth teacher was able to take care of all the dimensions in her teaching adjusted to the students she interacted with. She structured the work in a way that involved the students and let them take part in the structuring of the work. The students seemed to regard the teacher's way of structuring the work as a common structure. That enabled them, as a part of this framework, to structure their further work on their own. They had learned some action patterns of how to work. The teacher also repeated what the different working structures demanded from them. For instance, one student said during their project work that he remembered how they worked last time they worked in this way. He obviously liked both knowing how to cope with the work and the cooperation between the students where one was able to help the younger ones. This teacher had a clear leadership and joint control at the same time, which made it easier to use different rooms when they worked in groups, to let the students work partly on their own and interact with each other. She also created a good interaction both among the students and between the students and the teacher. It seemed as if, when the teacher clearly structured the lessons, the close interaction and the small environments easily lead to an "on-task" behavior, an engaged interaction, and a calm atmosphere.

A well-structured work, whether it is structured by the teacher or the students, facilitates a good interaction between all the involved parts. As Grannis (1978) points out, this must be gradually learned in a balance between the teacher's modeling of competence to be acquired on the one hand and the learner's consolidation of a competence through its application in self-directed expression and problem solving on the other. There can sometimes be a playing back and forth of activities embodying different forms of control, but the teacher must be aware of which control is needed in each activity.

The fifth teacher used more than anyone different teaching methods, for instance playing games, making stories, watching video and group discussion, but she really had problems with the interactional part of teaching. During teacher-paced activities, many of the students, especially the oldest ones, did not cooperate. They openly disturbed the teaching, talking together about other things, shouting to each other across the room, giving racist declarations during discussion, and so on. As a matter of fact, many of these students worked on their best during student-paced activities, especially when they worked in homogenous groups. In such a setting it should, however, be a goal to cooperate in heterogeneous groups. This requires focusing on the social dimension of the group interaction, what was very difficult to effectuate in this teaching context.

The situation, of course, made the teacher sometimes starting reprisals. She altered between being very calm and friendly and angrily blaming them. Most of the time she tried to be very supporting, although many of the students behaved very badly. Although she was really frustrated and did not know what to do, she was strongly arguing for the seventies' humanistic view of democracy. Hoping for a better cooperation, she for instance often rearranged the classroom, letting the students together decide where to sit and whom to sit together with.

To sum up the dominating dimensions in teachers' thinking and planning, it can again be pointed out that teaching is a very complicated task. It is not easy to cope with all the important dimensions of teaching at once. One important dimension is the interaction between students and teacher. The teacher must, however, also structure the work in a way that makes both the students and herself familiar with the action patterns. Only one of the these five teachers in my research had a very good balance according to what the contextual framework of the situation required from both the students and the teacher herself in the situation, a balance which created a joint control of the teaching situation.

The form of instruction must be seen as a part of the actual intellectual content of instruction. As Stodolsky (1988) points out, learning action patterns does not only depend on learning how to work, but also what content that work demands in itself. In arranging the classroom activity structure, more complex thinking should also be a part of the teacher's repertoire. The teacher cannot be technical in advising the students' work. Students should be able to understand the way of working as a part of solving a problem. If the students do not manage, they are subjected to much negative and unintended learning. The teacher should help them to be able to arrange their work in a way that gives them good feelings when working together. Schoolwork should give the students positive experiences. Then good action patterns are learned more easily.

I think that all schools have much in common, be they small or big, rural or urban. Pedagogical literature very often focuses on one dimension of teaching a time. This perhaps leads the teachers to focus on single dimensions of teaching and to neglect the whole of action patterns. Although some kinds of work can easily be worked out in such small school environments with only nine to eighteen students in a class, in the long run all the important dimensions of teaching should be taken care of.

Interaction through shared understanding of action patterns helps the students being able to work on their own in particular situations. This is a part of being able to act responsibly, understanding what a situation demands from them and being able to discuss the processes and what happens. When children are safe and they know according to what structures they have to proceed, they can be able to explore themselves more creatively and better work on their own. Without such agreed working conditions, neither the students can manage their cooperating and learning processes nor the teacher can stimulate the students' learning processes. The Norwegian National Curriculum states (p. 28): "Good teaching pushes the learning processes forward - but it is completed only by the students own contribution".

If the teaching shall be valuable for the students, there should be, as Dale (1986) points out, an interactional process, a social production of meaning, and an interactional chain of stimulus and response. In an interaction the actor "reads" the "signs" in the context. In a teaching context there are so many "signs" that have to be understood if the teaching-and learning—processes shall "flow" well. This is especially important on the primary school level, where we have to change activities with their working patterns very often.

There must also be room for spontaneity and the challenges of everyday life in the learning processes. The teacher must comprehend the students' perspectives and try to view the matters from their point of view. The teacher must also walk aside and, adjusted to the actual class, let the students have experiences of their own. She must dare to sometimes present challenges for the students, even if it is not certain that they will manage. Through common experience and analysis, they can furthermore turn negative experiences into positive learning. But there must be a balance. Teaching tasks can very easily be too complicated and give some students many negative experiences.

It seems as if, when the teacher structures the lessons, the students are also able to cooperate and take responsibility. Developmentally, this last example of thinking and acting occurred, as Grannis (1978) expresses it, not as a step between teacher and student control, but as a step beyond teacher and student control, the resolution of a conflict for control. The teacher should nevertheless be a visible leader.

Stressing some dimensions of teaching seemed to be in accordance with the way the school leadership was carried out and affected the whole school culture

The teachers in my case studies had been working as teachers for at least eight years and had all been in their respective schools for several years. The individual teacher's deeper level of assumptions and beliefs seemed to be in accordance with the deeper assumptions and beliefs behind the way school leadership was carried out. Although there were similarities between such small schools, some of the schools in my case studies had developed their own quite special culture. Culture is here defined as: "the deeper level of basic assumptions and beliefs that are shared by members of an organization" (Schein 1985, pp. 6-7).

The teacher who balanced the many dimensions of teaching in the best way worked in a school characterized by a well-constructed school leadership. In contrast to that, the school where the students set up against the teacher, the teacher did not get much support from the school leadership. The leader of the school had almost the same problems with these children. The children were partly treated like colleagues, but the leadership was too invisible to follow up intended goals for that interaction and what the students could learn from it. It thereby also seemed to be quite difficult for the teacher to change her ways of working. As a matter of fact, it seemed necessary to change the whole way of running the school.

As Siskin (1994) points out, the instructional philosophy of a school also influences classroom procedures. Solstad (1994), in his research on Norwegian schools, also found that there generally appear to be a clear, but complicated relationship between the cultural features of a school and the organizational manifestations. This was quite evident in the ways classrooms and school life were organized in some of the schools I examined, assuming that a small number of people can affect each other and form their culture more easily. There seemed to be a clear connection between the different parts that affected the school environments in such small schools. The workplace of teaching in these schools seemed to be, according to the concepts used by Siskin (1994, s. 39), very embedded and socially constructed.

Some special qualities of those schools, and how they can be strengthened.

An especially important quality of the small non-graded schools I examined was their close atmosphere and the possibilities of interaction between students and teachers. This was evidently a qualitative resource. But this resource had to be developed and refined. A good working atmosphere did not develop alone.

When work was structured, interaction between students and teacher was also very good. The structuring should not necessarily consist of formal demands made by the teacher, but it should be an outcome of the teaching as an interaction gradually built up as action patterns. This involves that the teacher should adjust her work according to social circumstances in teaching. The teacher should focus on different aspects of teaching situations and ensure that important aspects of the settings are evaluated, mostly by the students. In small societies, the children also bring to school the conflicts and the alliances of their society. Without structuring the methods used and as a part of that the social dimension of the work, the conflicts and the social hierarchies becomes a part of the lessons.

Research done in Norway by Bru (1998) shows that there is almost the same amount of harassment and emotional problems in small rural schools as in large urban schools. Therefore teachers in small rural schools should also systematically work to develop a supporting environment. To structure such pedagogical intentions requires a pedagogical leadership. The teacher should not be more relaxed than she can be in bigger schools. There should also be a visible school leadership,

The teachers I interviewed had few children to cope with. They all knew the children, their family and the surrounding society very well and saw the children as a part of a bigger context. The number of children and organizing the children in a multi-aged class can be a very important asset of such schools (Kvalsund, 1995). To really be an asset it must also be used as an asset in the teachers' thinking and planning. All the teachers in my case-studies were aware of these assets. They for instance organized the students in mixed-age groups most of the time in the lessons which I took part in.

In non-graded schools the activity structures from one subject lesson to another alter very much. In Norway the students in small rural schools are most often divided into even smaller groups in subjects characterized by a progressive knowledge, such as for instance mathematics and language studies. Very often the teacher in such settings allows the students to work and collaborate as they want by themselves. They can help each other, and even though this help is not part of a system, they work in a quite self-circumscribed setting, asking the teacher for help when they need it. This working on their own keeps them busy and the atmosphere may be quite home-minded and relaxed. In such a setting the students can also be allowed to talk without raising their hands in order to be allowed to.

This can of course be a very good working condition in a home-minded atmosphere. Other working conditions, however, require other action patterns. When the students then in other subjects, such as in Social Studies, join a bigger group with far more students, where the intention is to teach the whole group in a way that makes sense of co-education, the students must act according to a new setting. That demands knowledge of structures and at least that the teacher knows what the two different settings demand from all the persons involved in it. The teacher must structure the work in a way that makes the students aware of what rules should be followed in different settings. This is a matter of familiarity to action patterns. Such action patterns are as important in small non-graded schools as they are in urban schools, especially when the structures of the lessons in different subjects are rather different. It is, however, easy to forget this in such an open and intimate atmosphere which can exist in small non-graded schools.

In these cases I very often observed that, after the class had changed to a new structure, the teacher told the students to raise their hand before they should be allowed to talk, and they very often did not. Sometimes the teacher needs structure and action patterns to orchestrate teaching. This was a problem in some of the schools where there existed a form of home-minded communication with its vague action patterns.

In Norway Marit Rismak (1998) has studied what happens when the teacher tries to work out a system for the students of raising their hands to get their turn to talk. She found that the teacher very easily lets the students talk without raising their hands. The teacher often wants the talk to flow, seeing that it can create a good conversation in many situations. Some students learn very quickly to use the possibilities such settings give them being allowed to talk more and being heard more often than others. If their answers are right, they are more easily allowed to talk without raising their hands. If they at the beginning of their talk use the same words as the teacher ended with, they get through easier with their breaking in.

It seems as if these mechanisms are very easily utilized in small non-graded schools. Of course, the teacher sometimes wants to let the talk flow easily and having a natural and relaxed interaction between students being together in many settings, for instance in a group discussion. The teacher has to communicate what each setting requires from the students, in agreement with the action patterns they are familiar to and has to evaluate these settings together with the children.

As Vestre (1980) found in his research on how the last national curriculum was implemented in different kinds of Norwegian schools, students more often help each other in such non-graded schools than in fully graded schools. When this is focused on as an important quality of their work, they can also better succeed supporting each other. I my research the students in the well-organized interactional working class most often supported other students. We also recognized that they sometimes discussed the quality of each other's work.

An apparent quality of such non-graded schools is the communication with the surrounding society, for instance through making arrangements in cooperation with people in the surrounding society and cooperating with people outside the school environment in activities as for instance project-work. The class where the teacher most often solely puts the cognitive dimension of teaching ahead, took, for instance, part in collecting money for a partner community in Russia. This was a very practical work and something the students actually managed on their own, both entertaining, selling coffee, and cleaning up after the arrangement. Although only one of the teaching programs in my research contained such an activity, all the teachers could tell about many of such arrangements for the whole school that were organized together with people in the surrounding society.

This is consistent with what Solstad (1994) found in his research examining schooling and change in Norway. He compared small schools with larger schools and found that small schools more often than larger schools took or planned to take action in different areas such as local environment and the home situation and were more concerned about local issues. Students in such schools know the school's physical environment and they can easily participate in order to make an arrangement or working to arrange something practical for a lesson. The students can be a kind of working colleges in many practical settings. Small groups of students make it rather easy to work together in such practical settings.

Another quality which Solstad (1994) found when comparing small and large schools was that small schools more often manipulated the timetable to accomplish adapted education and had a somewhat higher flexibility in timetabling. This is consistent with what I found in my case studies. All the teachers used a quite flexible timetabling. They had also all moved away from a rigid ordinary school day of six lessons of 45 minutes. The conclusion must be that such schools have many assets depending on that the people working there strengthen these assets. The teachers in my case studies were aware of many of these assets, although pitfalls often seemed hard to avoid.

How can we understand the teachers' knowledge in an epistemological perspective?

In my research I see that during practicing, the teachers' language of teaching is most of all the practical language, although the practical aspects have their formal support. I suppose that they used more formal language passing their exam in teacher education. Teachers who use clear formal concepts trying to explain what they are doing, also are the teachers who best manage the practical teaching on a good level. The teacher who had a very good balance according to the different dimensions of teaching, also used most formal concepts of what she was thinking and doing. The content of her teaching was social as well as conceptual on different levels. She set the means and the ends of the activities in accordance with the contextual framework and the students' qualifications for managing the activities. She was also aware of what she wanted to develop further, by herself and through her students.

The teachers had different values, most of all as a part of their personal "tact", as van Manen (1995) calls it, but also as a part of "being modern" in a misunderstood way, as I would argue. Single teaching dimensions, such as the cognitive dimension or the democracy dimension, or being very occupied with pacing and the outcome of teaching could be overestimated in a way that this influenced the whole situation. Although other dimensions also indirectly were a part of their action patterns, these overestimated dimensions made it difficult for the teacher to develop a good interaction between herself and the students and being able to orchestrate the teaching.

Teaching needs both formal and practical knowledge in a good balance between many different teaching dimensions. Besides that, the teachers' personal attitudes are of great importance for how the teaching is arranged. Although the national curriculum defines the subject tasks to be settled out, teaching demonstrates considerable subjective variation. Prevalent research (Siskin, 1994) supports the fact that this is especially apparent in the subject of Social Studies

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Educational Renewal In Rural Alaska

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Abstract

This workshop will provide an overview of the Alaska Rural Systemic Initiative, a five-year effort that has been established through the Alaska Federation of Natives and the University of Alaska with funding from the National Science Foundation to assist schools throughout rural Alaska to integrate Alaska Native knowledge, ways of knowing and world views into all aspects of rural education. Discussion will include a description of the epistemological basis for the project, the organizational structure being utilized, the role of the community, and the cultural documentation process involved, as well as the implications for curriculum development, teaching, and support structures for village schools.

The Alaska Rural Systemic Initiative was established in 1994 under the auspices of the Alaska Native/Rural Education Consortium, representing over 50 organizations impacting education in rural Alaska. The institutional homebase and support structure for the AKRSI is provided through the Alaska Federation of Natives in cooperation with the University of Alaska, with funding from the National Science Foundation and the Annenberg Rural Challenge. The purpose of the Alaska Rural Systemic Initiative is to implement a set of initiatives that systematically document the indigenous knowledge systems of Alaska Native people and develop pedagogical practices that appropriately integrate indigenous knowledge and ways of knowing into all aspects of education. In practical terms, the most important intended outcome is an increased recognition of the complementary nature of Native and western knowledge, so both can be more effectively utilized as a foundation for the school curriculum and integrated into the way we think about learning and teaching.

For any significant initiative aimed at improving education in rural Alaska, it is essential that we develop from the outset a working partnership of mutual respect and understanding between the Native and educational communities. The history of contradictions, confusion and conflict resulting from the coming together of two often incompatible cultural traditions and belief systems can best be overcome by drawing together the available expertise from each and exploring ways to arrive at an equitable synthesis. The first step in this endeavor was a series of colloquia on "Alaska Native Science Education" held in April, 1992 and May, 1993, sponsored by the Alaska Federation of Natives and the University of Alaska Fairbanks, with funding provided by the National Science Foundation. Topical areas that were addressed by the 60 broadly representative participants in the colloquia included Native scientific traditions, western scientific traditions, science practices in various community and institutional settings, science curricula in schools and universities, science teaching practices, and science teacher training opportunities. Out of these discussions, an extensive set of recommendations were put forward regarding steps to be taken to improve the quality of science education, and education generally, for Alaska Native people. These recommendations then served as the impetus for the formation of the Alaska Native/Rural Education Consortium, as well as the basis for the initiatives that make up the AKRSI reform strategy. To help put these interrelated issues into perspective, it is necessary to provide a brief overview of the geographical and political context in which the AKRSI initiatives were formed and are now being implemented.

Rural Alaska

By most any standards, nearly all of the 586,000 square miles and 245 communities that make up the state of Alaska would be classified as "rural." Approximately 40% of the 600,000+ people living in Alaska are spread out in 240 small, isolated communities ranging in size from 25 to 5000, with the remaining 60% concentrated in a handful of "urban" centers. Anchorage, with approximately 50% of the total population, is the only potential metropolitan area in the state. Of the rural communities, over 200 are remote, predominantly Native (Aleut, Eskimo and Indian) villages in which 70% of the 90,000 Alaska Natives live. The Alaska Department of Labor estimates the Native population will grow to 108,700 by the year 2000. The vast majority of the Native people in rural Alaska continue to rely on subsistence hunting and fishing for a significant portion of their livelihood, coupled with a slowly evolving cash-based economy, though few permanent jobs exist in most communities. According to a 1990 survey, the percentage of people living in "poverty" in rural communities in Alaska ranges from 15% to 57%, with the average income in the $7,000 to $15,000 range.

Rural Schools

Prior to 1975, the schools in rural Alaska were administered by either the federal Bureau of Indian Affairs or the Alaska State-Operated School System, both centrally administered systems oriented toward bringing Alaska Natives into mainstream society as their primary goal. The history of inadequate performance by the two school systems, coupled with the ascendant economic and political power of Alaska Natives that derived from the passage of the Alaska Native Claims Settlement Act by the U.S. Congress in 1971, led to the dissolution of the centralized systems in the mid-1970's and the establishment of 21 locally controlled regional school districts to take over the responsibility of providing education in rural communities. At the same time, a class-action lawsuit brought against the State of Alaska on behalf of rural Alaska Native secondary students led to the creation of 126 village high schools to serve those rural communities where high school students had to leave home previously to attend boarding schools.

Although the creation of the regional school districts (along with several single-site and borough districts) and the village high schools has provided rural communities with an opportunity to exercise a greater degree of political control over the educational systems operating in rural Alaska, it did not lead to any appreciable change in what is taught and how it is taught in those systems. The continuing inability of schools to be effectively integrated into the fabric of many rural communities after over 20 years of local control points out the critical need for a broad-based systemic approach to addressing educational conditions in rural Alaska.

Forging an Emergent System of Education for Rural Alaska

In May, 1994 the Alaska Natives Commission, a federal/state task force that had been established two years earlier to conduct a comprehensive review of programs and policies impacting Native people, released a report articulating the critical importance of any effort aimed at addressing Alaska Native issues needing to be initiated and implemented from within the Native community. The long history of failure of external efforts to manage the lives and needs of Native people made it clear that outside interventions were not the solution to the problems, and that Native communities themselves would have to shoulder a major share of the responsibility for carving out a new future. At the same time, existing government policies and programs would need to relinquish control and provide latitude for Native people to address the issues in their own way, including the opportunity to learn from their mistakes. It is this two-pronged approach that is at the heart of the Alaska Rural Systemic Initiative educational reform strategy -- Native community initiative coupled with a supportive, adaptive, collaborative education system.

This strategy requires that we focus our attention on both the formal education system and the indigenous knowledge systems in rural Alaska. The culture of the formal education system as reflected in rural schools is poised to undergo significant change, with the main catalyst being standards-based curriculum grounded in the local culture. In addition, the indigenous knowledge systems need to be documented, articulated and validated, again with a major catalyst being standards-based curriculum grounded in the local culture. With these catalysts in mind, we have sought to implement a series of initiatives that stimulate the emergent properties of self-organization that are needed to produce the kind of systemic integration indicated above. To do so, it is essential that we work through and within the existing systems.

Our challenge has been to identify the units of change that will produce the most results with the least effort. That has meant identifying and targeting the elements of the system around which a renewed emergent order can coalesce. Once these critical agents of change have been appropriately identified, a "gentle nudge" in the right places can produce powerful changes throughout the system. With these considerations in mind, the overall structure of the Alaska Rural Systemic Initiative has been organized around the following sets of initiatives (five funded by NSF focusing on math and science, and five funded by ARC focusing on social studies and language arts). Each of these initiatives is being implemented in one of the five major Alaska Native cultural regions each year on an annual rotational scale-up schedule over a five-year cycle. In this way, the initiatives can be adapted to the cultural and geographic variability of each of the regions, while at the same time engaging the state-level support structures throughout the five-year cycle.

Along with the rotational schedule of regional initiatives, there are also a series of cross-cutting themes that integrate the initiatives within and across regions each year. While the regional initiatives focus on particular domains of activity through which specialized resources are brought to bear in each region each year (culturally aligned curriculum, indigenous science knowledge base, etc.), the following themes cut across all initiatives and regions each year:

- Documenting cultural/scientific knowledge
- Indigenous teaching practices
- Standards/culturally-based curriculum
- Teacher support systems
- Appropriate assessment practices

In this way, schools across the state are engaged in common endeavors that unite them, at the same time that they are concentrating on particular initiatives in ways that are especially adapted to their respective cultural region. Each set of initiatives and themes build on each other from year to year and region to region through a series of statewide events that bring participants together from across the regions. These include working groups around various themes, Academies of Elders, statewide conferences, the AN/RE Consortium meetings, the Alaska

Native Science Education Coalition and the Alaska Native Knowledge Network.

The key agents of change around which the AKRSI educational reform strategy has been constructed are the Alaska Native educators working in the formal education system coupled with the Native Elders who are the culture-bearers for the indigenous knowledge system, along with the Quality Schools Initiative and content standards adopted by the Alaska Department of Education. Together, these agents of change constitute a considerable catalytic force that is serving to reconstitute the way people think about and do education in rural schools throughout Alaska. The role of the Alaska Rural Systemic Initiative has been to guide and support these agents through an on-going array of locally-generated, self-organizing activities that produce the "organizational learning" needed to move toward a new form of emergent and convergent system of education for rural Alaska. The overall configuration of this emergent system may be characterized as two interdependent though previously separate systems being nudged together through a series of initiatives maintained by a larger system of which they are constitutent parts, as illustrated in the following diagram:

The components of the emergent system representing the indigenous knowledge sub-system and the formal education sub-system are depicted here as they appear today, two years into the systemic reform initiative. Over the first two years, the two sub-systems have been brought in contact with one another with an increasing level of two-way interaction occurring daily that is slowly building the interconnectivity and complementarity of functions that is the goal of the reform strategy. Each of the initiatives in the field surrounding the two sub-systems serve as a catalyst to energize the sub-systems in ways that reinforce the efforts of the agents of change identified previously. For example, the Alaska Native Knowledge Network assembles and provides easy access to curriculum resources that support the work underway on behalf of both the indigenous knowledge system and the formal education system. In addition, the ANKN newsletter, *Sharing Our Pathways*, provides an avenue for on-going communication between all elements of the constituent systems. Concurrently, the AKRSI is collaborating with the Alaska Department of Education in bringing Native/science teachers together to develop performance standards based on the state content standards that take into consideration the cultural context in which students acquire and demonstrate their knowledge. These performance standards will then become part of the states performance assessment system to be implemented in all schools.

Together, these initiatives (along with other related activities) constitute the Alaska Rural Systemic Initiative and are intended to generate a strengthened complex adaptive system of education for rural Alaska that can effectively integrate the strengths of the two constituent emergent systems. The exact form this new integrated system will take remains to be seen as its properties emerge from the work that is underway. Accepting the openendedness and unpredictability associated with such an endeavor, and relying on the emergent properties associated with the adage, "think globally, act locally," we are confident that we will know where we are going when we get there. It is the actions associated with each of the initiatives that will guide us along the way, so that we continue to move in the direction established by the AKRSI educational reform strategy.

Intervention Activities: An Overview

Following is a brief description of some of the key AKRSI-sponsored initiatives to illustrate the kind of activities that are underway, as they relate to the overall educational reform strategy outlined above.
Alaska Native Knowledge Network - A bi-monthly newsletter, world wide web site (http://www.uaf.alaska.edu/ankn), and a culturally-based curriculum resources clearinghouse have been established to disseminate the information and materials that are being developed and accumulated as the AKRSI initiatives are implemented throughout rural Alaska.

S.P.I.R.A.L. Curriculum Framework - The ANKN curriculum clearinghouse is identifying and cataloging curriculum resources applicable to teaching activities revolving around 12 broad cultural themes organized on a chart that provides a "Spiral Pathway for Integrating Rural Alaska Learning." The themes that make up the S.P.I.R.A.L. framework are family, language/communication, cultural expression, tribe/community, health /wellness, living in place, outdoor survival, subsistence, ANCSA, applied technology, energy/ecology, and exploring horizons. The curriculum resources associated with each of these themes can be accessed through the ANKN website.

Cultural Documentation/Atlas - Students in rural schools are interviewing Elders in their communities and researching available documents related to the indigenous knowledge systems, and then assembling the information they have gathered into a multimedia format for publication as a "Cultural Atlas" on CD-ROM and the Internet. Documentation has focused on themes such as weather prediction, edible and medicinal plants, geographic place names, flora and fauna, moon and tides, fisheries, subsistence practices, food preservation, outdoor survival and the aurora.

Native Educator Associations - Associations of Native educators have been formed in each cultural region to provide an avenue for sustaining the initiatives that are being implemented in the schools by the AKRSI. The regional associations sponsor curriculum development work, organize Academies of Elders and host regional and statewide conferences as vehicles for disseminating the information that is accumulated.

Native Ways of Knowing - Each cultural region is engaged in an effort to distill core teaching/learning processes from the traditional forms of cultural transmission and to develop pedagogical practices in the schools that incorporate these processes (e.g., learning by doing/experiential learning, guided practice, detailed observation, intuitive analysis, cooperative/group learning, listening skills).

Academies of Elders - Native educators are convening with Native Elders around a local theme and a deliberative process through which the Elders share their traditional knowledge and the Native educators seek ways to apply that knowledge to teaching various components of the standards-based curriculum. The teachers then field test the curriculum ideas they have developed, bring that experience back to the Elders for verification, and then prepare a final set of curriculum units that are pulled together and shared with other educators.

Cultural Standards - A set of "Alaska Standards for Culturally Responsive Schools" have been developed for students, teachers, curriculum, schools and communities that provide explicit guidelines for ways to integrate the local culture and environment into the formal education process so that students are able to achieve cultural well-being as a result of their schooling experience.

Village Science Curriculum Applications - Three volumes of village oriented science curriculum resources are being developed in collaboration with rural teachers for use in schools throughout Alaska. They will serve as a supplement to existing curriculum materials to provide teachers with ideas on how to relate the teaching of basic science and math concepts to the surrounding environment.

AISES Chapters/Native Science Fairs - K-12 chapters of the American Indian Science and Engineering Society are being formed in rural districts serving each cultural region. These chapters are participating in AISES Science Camps and are sponsoring Native Science Fairs in which the projects are judged for their science content by experienced science teachers and for their cultural content by Native Elders. The winners of the regional fairs attend the national AISES Science Fair in the Spring.

Alaska Native Science Education Coalition - The ANSEC is made up of representatives from over 20 agencies, professional organizations and other programs that have an interest and role in science and math education in rural Alaska schools. The Coalition is seeking to bring its vast array of curriculum and professional development resources into focus around the implementation of standards/ culturally-based science curriculum, including the incorporation of rural/cultural considerations in the Coalition members own materials and practices (e.g., Alaska Science Consortium workshops, Project Wild curriculum materials, National Park Service interpretive programs).

Math/Science Unit-building Workshops - Under the sponsorship of the ANSEC, small regional teams of science teachers, Native teachers, Elders and scientists (each of whom learn from the others) are assembled for two days of concentrated work aimed at building science and math curriculum units around a locally identified theme that can serve as a focus for meeting state content standards starting from a knowledge base grounded in the local environment (e.g., weather, food preservation, moon/tides, birch trees, berries, measuring systems). The units are then field tested by the participating teachers, refined and made available to teachers throughout the state as models for an on-going process of standards-based and culturally-grounded curriculum development.

Math/Science Performance Standards - Performance standards in the areas of math and science are being developed that will serve as benchmarks for the state assessment system in those content areas. Through AKRSI support, representation from rural/Native communities is helping to incorporate the various cultural and geographic perspectives needed to provide equity in the assessment process.

Are We Making a Difference?

As the Alaska Rural Systemic Initiative approaches the midpoint of its five-year trajectory, preliminary data from the districts we are working with indicate that the educational reform strategy we have chosen -- to foster interconnectivity and complementarity between the formal education system and the indigenous communities being served in rural Alaska -- has produced an increase in student achievement scores, a decrease in the dropout rate, an increase in the number of rural students attending college, and an increase in the number of Native students choosing to pursue studies in fields of science, math and engineering. The initiatives outlined above have demonstrated the viability of introducing strategically placed innovations that can serve as catalysts around which a new, self-organizing, functionally-integrated educational system can emerge which shows signs of producing the quality of learning opportunity that has eluded schools in Native communities for over a century. The substantial realignments that are already evident in the increased interest and involvement of Native people in education in rural communities throughout Alaska point to the efficacy of a systemic approach in shaping reform in educational systems.

While the NSF funding of the Alaska RSI initiative has been the catalyst for the core reform strategy, we have been fortunate to acquire substantial supplementary funding to address areas for which the RSI funds were not suitable, such as indigenous curriculum materials development (from the NSF Division of Instructional Materials Development), and implementing comparable initiatives to those of AKRSI in the areas of social studies, fine arts and language arts (from the Annenberg Rural Challenge). All of these funds combined provide an opportunity to address the issues facing schools in Native communities throughout rural Alaska in a truly comprehensive and systemic fashion.

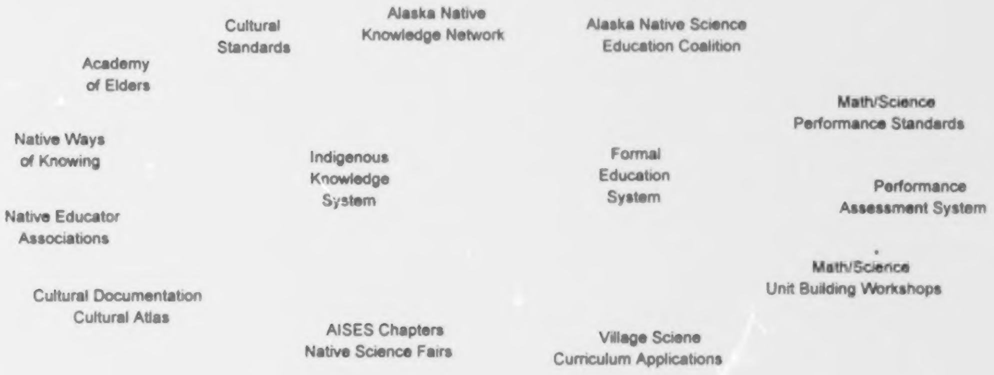
As a means to help document the process of systemic reform in rural schools, we have joined in two projects that will result in comprehensive case studies of educational practices and reform efforts in nine rural communities/schools in Alaska, to be conducted over a period of three years. Seven of the case studies are funded through the Northwest Regional Educational Laboratory by a field-initiated grant from the National Institute for At-Risk Youth under USDOE, and the other two are being administered by Harvard University through a grant from the Annenberg Foundation. Since all of the communities are in school districts associated with the Alaska Rural Systemic Initiative, we will be able to obtain a good cross-section of in-depth data on the impact of the RSI reform effort over the next few years.

We are mindful of the responsibilities associated with taking on long-standing, intractable problems that have plagued schools in indigenous settings throughout the world for most of this century, and we have made an effort to be cautious about raising community expectations beyond what we can realistically expect to accomplish. We are also mindful of the larger context in which the AKRSI operates and the expectations of the funding agencies with mandates to support initiatives that can contribute to a larger national agenda. Our experience thus far is such that we are confident in the route we have chosen to initiate substantive reforms in rural schools serving Alaska's Native communities, and while we expect to encounter plenty of problems and challenges along the way, we are capitalizing on a broadly supportive climate to introduce changes that will benefit not only rural schools serving Native students, but will be instructive for all schools and all students. We welcome the opportunity to continue to explore these ideas and find ways to strengthen and renew the educational systems serving people and communities throughout our society.

NSF/ARC Combined Yearly Cycle of Activities by Cultural Region

NSF **Annenberg**

Rural Systemic Initiative/Year (1995-2000)	**1995-96**	**1996-97**	**1997-98**	**1998-99**	**1999-2000**	**Rural Challenge Initiative/Year** (1996-2000)
Native Ways of Knowing/Teaching	Yup'ik Region	Inupiaq Region	Athabascan Region	Aleut/Alut. Region	Southeast Region	**ANCSA and the Subsistence Econ.**
Culturally Aligned Curriculum	Southeast Region	Yup'ik Region	Inupiaq Region	Athabascan Region	Aleut/Alut. Region	**Language/ Cultural Immersion Camps**
Indigenous Science Knowledge Base	Aleut/Alut. Region	Southeast Region	Yup'ik Region	Inupiaq Region	Athabascan Region	**Oral Tradition as Education**
Elders and Cultural Camps	Athabascan Region	Aleut/Alut. Region	Southeast Region	Yup'ik Region	Inupiaq Region	**Reclaiming Tribal Histories**
Village Science Applications	Inupiaq Region	Athabascan Region	Aleut/Alut. Region	Southeast Region	Yup'ik Region	**Living in Place**


Cultural Standards
Alaska Native Knowledge Network
Alaska Native Science Education Coalition
Academy of Elders
Math/Science Performance Standards
Native Ways of Knowing
Indigenous Knowledge System
Formal Education System
Performance Assessment System
Native Educator Associations
Math/Science Unit Building Workshops
Cultural Documentation Cultural Atlas
AISES Chapters Native Science Fairs
Village Sciene Curriculum Applications

ALASKA RURAL SYSTEMIC INITIATIVE

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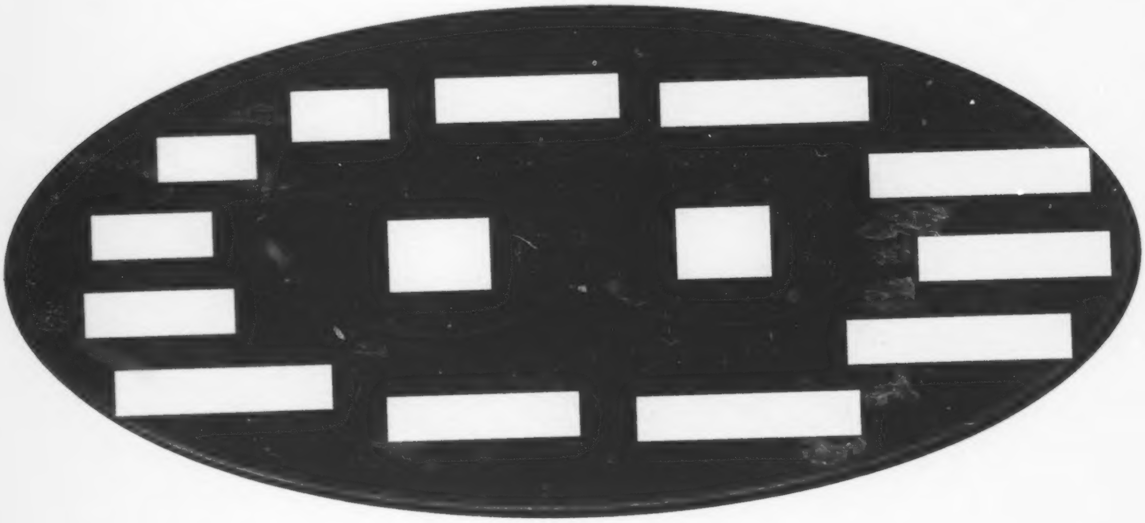

Creating Partnerships: An Australian Experience In Rural Health

Leann Brown, Angela Murphy & Rosemary Green, Australia

Abstract

Within Australia there has been a significant shift in attitude towards universities taking an active role in working with rural communities to address issues related to rural health. This shift has been central to the initiation and development of the Centre for Rural and Regional Health (CRRH) at the University of Ballarat, a small regional university located within the Grampians region of Victoria. The Centre was established to facilitate participation and collaboration across University, government and community groups in order to improve outcomes in rural health. The CRRH functions as a conduit: linking the key stakeholders within the community with academics in the field. It is multidisciplinary in nature involving staff with expertise in the areas of nursing, education, welfare, psychology, occupational health and safety, and health promotion. This paper provides an overview of the operational processes of the Centre and strategies used to establish and maintain active partnerships and networks. A model outlining the interconnections that have emerged will be presented.

The Grampians Region: An Overview

The diversity of the issues and service needs addressed through the CRRH are best understood in terms of the geographic and population characteristics of the region within which the Centre works. The CRRH at the University of Ballarat is located within the Grampians Region of Victoria, Australia. The Region encompasses an area of approximately 48 000 square kilometres and includes eleven local government areas. It is made up of provincial cities and isolated and remote rural communities.

There are approximately 201 000 people residing in the Region of which 79 000 reside in the regional centre of Ballarat. There are also three of the fastest growing municipalities in Regional Victoria and three municipalities with a significant rate of population decline. The diversity means that the area is representative in terms of population distribution and the subsequent issues emerging in relation to health needs.

The 1999 Victorian Burden of Disease Study: Mortality (Department of Human Services) showed that, on some indicators, the Grampians Region has one of the worst life expectancy rates for country Victoria with cardiovascular health being a key area of concern within the region.

The health, education and welfare service system for the region ranges from large State and Commonwealth government bureaucracies through to small single worker agencies. Service provision focus, in line with regional need, varies from centralised attendance points through to outreach services into local and sometimes isolated communities.

The establishment of the Centre: An Introduction

A significant shift in attitude towards the importance of rural communities and rural health was signaled during 1996, with the provision of commonwealth funds for the development of a number of University Departments of Rural Health (UDRH's) throughout Australia. The primary objective of these Departments is to 'improve access by rural and remote communities to appropriate services through the provision of professional support, education and training for rural and remote health workers (Walker, 1999). As a result of this initiative, key members from the University of Ballarat were proactive in their efforts to establish a Centre for rural health in order to represent the both the University and the wider Grampians region. These individuals took the opportunity to bring together interested parties to explore opportunities for cooperative action that could lead to the development of a significant profile in rural health within the region.

In 1997 the University hosted a two-day rural health workshop. This was conducted as part of extensive community consultation and planning processes in order to establish a developmental framework for the proposed Centre. The workshop attracted a wide range of health professionals from the Grampians community. Within the University itself, academics from the Schools of Behavioural and Social Sciences and Humanities, Education, Engineering (VIOSH Australia), Human Movement and Sports Science, and Nursing, strongly supported the development of a Centre focusing on rural and regional health. The workshop was pivotal in determining the level of community support for the concept and in achieving 'consensus' as to the type of Centre required within the region to serve the interests of the community, health providers and the University.

From these consultations and by keeping in line with the thrust of key commonwealth and state government health policies (Healthy Horizons and Rural Health Matters), the emerging Centre for Rural and Remote Health has developed in a truly multi-disciplinary manner. It brings together researchers, educators, and practitioners from the fields of nursing, psychology, social science, occupational health and safety, education, sport science, health promotion, and social welfare.

The mission statement developed for the Centre is:

The Centre for Rural and Regional Health (CRRH) will address regional issues and improve the health of rural people and communities through multi-disciplinary collaborative partnerships in research, education and training, and community and service development.

The Centre is firm in its commitment to adopting a holistic approach to rural and regional health issues. The social indicators of health and the impact of education, welfare and community on health underpins much of our work and to date, a wide range of projects and community based activities have been undertaken in these areas.

Guiding Principles

The following principles were developed to help guide our collaboration with key stakeholders within the Region:

(1) Strategic collaboration and networking

- The functioning CRRH will engage a wide communication network and will always act collaboratively. This cooperation will involve University schools and disciplines, and the many community health sectors, as well as other Centres and organisations.

(2) A practical approach to identified needs

- Centre activities will build upon existing networks, creating new initiatives in response to needs analyses:
- Action in response to identified needs will be informed by a specific understanding of a University's capabilities – in particular the University of Ballarat's special capabilities and strengths;
- A commitment to responding to real needs will imply provision for participation of both providers and partners in all decision making;
- The Centre will balance effectiveness with efficiency, but will recognise the principles of affirmative action with respect to the issues of culture, social justice, access and equity in rural and remote areas.

(3) Bring a focus for regional resources

The CRRH will become a vital, recognisable and accessible source of information, contacts and ideas to the extent that it is able to:

- bring together the specialised knowledge, skills and experience of educators, promoters, practitioners, groups, individuals and communities throughout the region;
- link these to resources outside the region in other Centres and organisations;
- maximise the potential of new information technologies;
- foster and develop the human potential of the region and beyond; and
- act as a brokering agent for community based research.

Creating Successful Collaborative Partnerships

The strengths of the Centre are largely attributable to the development of strong links within the Grampians region. These links have resulted in a number of collaborative projects and partnerships and as such, underpin the capacity of the Centre to assist with the achievement of improvements in rural health outcomes.

In terms of initiating and sustaining advances in health promotion, Poole (1997) argues that community structures must be in place so that individuals and groups can participate in decision making, planning and taking action in order to maintain effective programs. These structures may take the form of professional networks and/or partnerships which are formed around a socially 'co-operative interest' (O'Neil, 1997). In the Grampians region this interest is in the area of rural health. According to Onyx and Bullen (2000), the development of, and participation in, networks assist in increasing social capital. This is particularly so, where there are conditions such as 'trust, norms and networks that can improve the efficiency of society by facilitating coordinated actions' (Putnam as in Onyx & Bullen, 2000).

Significant effort has been placed in the establishment of collaborative partnerships and as such, the Centre has developed a reputation as a 'gateway' to the University for a wide range of health professionals and community groups seeking assistance with health related initiatives. Project related partnerships have been entered into with a wide variety of professional groups and organisations including Divisions of General Practice, primary health care providers, community health organisations and specialist agencies. Importantly, the Centre has assisted with facilitating links between University staff and community-based requests for project assistance, and has participated in a number of strategic planning activities within the region. Examples of the types of partnerships established include the University of Ballarat/Department of Human Services, Rural Health Taskforce. The taskforce also negotiates collaborative projects and examines long-term strategic directions for rural health within the region.

The CRRH is also an active member of Victorian Universities Rural Health Consortium, which is comprised of representatives from the five participating universities, and other peak organisations such as Victorian Aboriginal Community Controlled Health Organisation, Coordinating Unit for Rural Health Education Victoria, Department of Human Services and Department of Health and Aged Care. The Consortium recently released the *VURHC Operational Plan for the year 2000*, which outlines priorities for action for addressing rural health issues. The CRRH will be adopting, where appropriate, the relevant priorities for investigation and implementation within the Grampians Region.

The CRRH, is also involved in a Joint Liaison Committee with a major primary health care provider to explore areas of partnership and cooperation. Joint projects will be developed in a number of priority health areas. Specific terms of reference are being established with the view of ensuring that good channels of communication are established and maintained in order to facilitate activities between the organisations.

A key initiative of the Centre, and one which firmly cements our commitment to the regional community, is the establishment of community membership to the Centre. The aim has been to gain broad-based representation from across the region and has resulted in excess of 100 applicants from a wide range of agencies and professionals. Membership involves no financial outlay on the part of agencies and is aimed at providing the community sector with both services and opportunities for involvement.

Community membership offers the following:

- A regular newsletter providing information on key issues relating to health and wellbeing;
- The opportunity to participate in forums and seminars on rural health issues;
- A central access point to the Centre in regard to projects, research and education in rural health;
- An avenue for involvement and participation in the development of information technology initiatives through our links with other developing centres;
- An opportunity to provide input to the University as we work to facilitate projects and research in which the perspective of the local community and service system is a central driver;
- Direct and regular two-way access to the Centre via the established information technology/email communication systems; and
- Data base information regarding relevant policy and strategic planning information relating to rural health.

Key Areas of Focus

The Centre has identified, though collaboration and consultation with members and community partners, a number of key areas of focus which will drive the work of the Centre over the next three years (RHRC Rural Health Forum, 1999). These include, for example:

(1) Improving rural health practice:
- Provision of education and training
- Research into evidence based practice in rural health
- Identification and prioritising of region specific health issues

(2) Strengthening capability and sustainability of rural communities through:
- Community capability strengthening
- Development of community based expertise in needs assessment and program planning, implementation and review
- Working with local communities to identify resource availability and ways in which to harness community/resource potential
- Research aimed at building a body of theoretical knowledge on community/capacity building in rural and regional communities.

(3) Innovation and application of Information Technology to rural health though:
- Facilitation of the establishment of multi disciplinary and multi sectoral Information Technology links
- Identification of locality specific IT needs
- Development of innovative applications of IT to address needs in areas of community health, clinical practice, education and intervention
- Research into IT provision which focuses on the effectiveness of IT in improving rural health practice and the capacity of IT to support and sustain rural communities.

Summary

The groundswell of interest in addressing health concerns existing within rural communities is continuing to gain momentum within the Grampians region. This is highlighted by the overwhelming response from community groups and professional agencies in electing to enter into networks and partnership arrangements with the Centre which focus on key rural health issues. The key to ongoing success and improvement in rural health will be largely dependent on effective links and working arrangements which foster trust and collaboration while working toward mutually agreed ends.

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SUSTAINABLE LIVELIHOODS IN RURAL CANADA

Tony Fuller, John Devlin, Lee Ann Small, Barbara Johnson, Canada

Introduction

The purpose of this paper is to introduce the concept of Sustainable Livelihoods into the thinking of the development community in western rural society. It is intended to test its relevance to the North in terms of gaining a better understanding of how rural society works in western industrial nations. The paper is exploratory and raises questions as well as opportunities for further research. Although not linked directly to poverty, as in the South, the concept here is used to look at rural livelihoods in general.

Sustainable Livelihoods

Sustainable livelihoods has been gaining increasing attention as a new focus for development research and aid programming. The concept was first used in the work of the Bruntland Commission in the mid-1980s. The Institute of Development Studies at the University of Sussex has devoted substantial attention to the problem through a series of working papers and these have contributed to a framework for sustainable livelihoods adopted by the Department For International Development (UK) as a major programming thrust. (DFID 1999). Its importance as an organizing concept for development programming has also been recognized by the United Nations Development Programme (UNDP 1999).

The sustainable livelihood approach has emerged as a manifestation of the bottom-up approach to development programming, the paradigm shift in development management that recognized the importance of citizen participation to successful development practice. The result is an orientation which lays significant stress on the role of micro level, the "processes of collective empowerment taking place in localities." (Amalric 1998:34). Rather than rest entirely with "local" approaches to development however, sustainable livelihoods (SL) thinking advocates a combination of both macro and micro measures, such that local action is responded to and is in harmony with macro developments.

It is an orientation that also stresses action over structure as the focus of development failure and success.

"...we have come to accept that development cannot be done for people, not even of or with them. Development is potentially effective only when it is done by people themselves. They are the primary "stakeholders" – they must own the activity – for it to become reality.." (Hyden 1998, p.1)

In addition to its micro action orientation the concept has been attractive because it can focus attention on one important dimension of the development problem. Livelihoods are more tangible things than development processes. They are "easier to discuss, observe, describe and even quantify." (Rennie and Singh 1996:16)

A critical focus of attention has been the question of how livelihoods are constructed. (Figure One). To gain a living an individual or household makes use of assets (capabilities and capitals). Capabilities include the range of skills and knowledge captured under the general term "human resources"

In addition to human resources there are tangible financial assets (such as, gold, jewelry, cash savings and mutual funds and, at a larger scale, the funding resources of institutional actors). There are also material assets (equipment, tools, machinery, livestock and infrastructure). There are also natural assets (land, water, trees, climate). In addition there are intangible assets including claims and appeals that can be made by the household on others for material, moral or other support.

"Claims may be made on individuals or agencies, on relatives, neighbours, patrons, chiefs, social groups or communities, or on NGOs, government or the international community, including programmes for drought relief, or poverty alleviation. They are based on combinations of right, precedent, social convention, moral obligation and power." (Chambers and Conway, 1992 p.11)

These relations are captured by the concept of "social capital". Social capital will be specific to each social context. Rights, precedents, social conventions, moral obligations and power vary from community to community, province to province and nation to nation. Social capital is embedded within vertical (patron/client) or horizontal (friendship/shared interest) networks. Social capital can also involve membership in more formalized groups which may require adherence to mutually-agreed or commonly accepted rules, norms and sanctions but which provide access to a variety of membership benefits. And social capital can refer to much less formal relationships of trust, reciprocity and co-operation, that may provide the basis for informal safety nets. (DFID 1999:Section 2.3.2). All of these forms of social capital can increase access to financial and material assets that can be made available from others including powerful individuals and organizations or they can increase the capacity of the individual or household to take advantage of available assets by increasing the capacity for putting assets to effective use in generating livelihoods.

But an analysis of the variety of forms of assets will not completely account for livelihood strategies. Livelihoods are shaped by larger scale structural factors, institutions, organizations, policies and legislation that shape what individuals and households can do with the assets under their control. These may also be referred to as "entitlements" (Figure One). Entitlements can also be shaped by social institutions, the regular and widespread patterns of behaviour structured by rules and norms that are found in all societies. (Scoones 1998:12).

Thus while sustainable livelihoods gives primary attention to individuals, groups and communities a concern with larger social institutions, organizations, structures and processes are not abandoned. The researcher is encouraged to look at micro, meso and macro factors. These tiers of interaction have not been found to work with great success in developing countries. Davies and Hossain find that examples of partnerships between state, society and community are rare. It appears that "the ways in which the three domains of institutional control operate militate strongly against such partnerships" and that the "consequences of the interaction between state, society and community for livelihood adaptation are rarely directly addressed" (1997:40)

In the sustainable livelihoods literature the state is sometimes viewed as a potentially positive force for development. Chambers and Conway (1992,) observe that there are clearly important things that can be achieved through public action to reduce the vulnerability of the poor, "flood prevention, disaster preparedness, off-season public works to provide employment, prophylaxis against diseases, and the like. (1992 p.16). But the state is also often portrayed as a negative force ((Chambers 1987: 23-24); Chambers 1987b:14). Law, force, and bureaucratic barriers facilitate "appropriation and exclusion by the powerful." (Chambers and Conway, 1992 p.13)).

While there is a firm analytic foundation for the framework it has been caught up in a prescriptive agenda which is not yet firmly rooted in any empirical analysis of livelihood success. The fundamental research questions raised by the sustainable livelihoods framework concern how livelihoods are constructed. It is intuitively clear that the range of livelihoods is diverse and that there are a myriad of different ways that households and individuals sustain themselves and make a living. The value of the sustainable livelihoods concept lies in the framework's ability to incorporate micro, meso and macro scales of interaction such that the individual and the household can be seen and analyzed in the contexts of the community, policy, governance, and the social system (Figure One). This invites one to sort out what the primary influences are on the livelihood strategy adopted by the farm family at any one point in time and to account for countervailing and accommodating elements in that set of influences. This de-emphasizes the application of macro-theorization and invites a more inductive approach to theory building (Bienefeld 1995) Sustainable livelihoods thinking suggests that most people, most of the time, make choices based on their own circumstances, as they perceive them, and that these choices are informed but not determined by exigencies which constrain and provide opportunity for change. (Fuller and Small 1999:5)

As a starting point for empirical work it will be useful to distinguish between *livelihood activities* which are quite discrete forms of behaviour which can contribute to making a living and *livelihood strategies* which refer to the ways in which individuals or households choose to combine activities into a package of activities which generate a livelihood. Thus dairy farming, vegetable gardening and working at a local auto body shop represent three livelihood activities. These might be combined into a livelihood strategy which provides the living for an individual or a household. And such livelihood strategies may change over time generating *livelihood paths*.

This simple schema already generates a rich research agenda. What are the livelihood activities practiced and available at specific times and places. What combinations of these activities are adopted as livelihood strategies. And how do these strategies evolve through time. The empirical challenge is to distill these myriad individual activities, strategies and paths into some workable typologies which will serve as foundations for further analysis, particularly for comparative studies across space and time.

The theoretical issues raised will involve the effort to understand the conditions that allow these activities to emerge, the conditions that explain why particular strategies are adopted and the conditions that account for why particular paths are followed. Such research would invoke the best traditions of "inductive" approaches to social behavior. The systematic study of entitlements (e.g. farm supports, delivery of social services) may make a useful contribution to our understanding of what influences livelihood strategies.

Contemporary changes in macro structures are generating rapid changes in rural livelihood strategies. Are entitlements accessible, used, redundant, out of date? How do changes in local governance (diminished farm voice and massive municipal restructuring) affect the livelihood strategies of farm households? (Fuller and Small 1999:6)

In addition to these contemporary issues there is also the appreciation of how the rural community arrived at the current livelihood conjuncture. The evolution of the rural community and economy has implied a secular shift in livelihood activities. Contemporary rural livelihood choices can best be understood against the backdrop of structural transformation that has carried the rural community from the isolated farmsteads of the pioneer era to the frenetic pluriactive rural households of today (Fuller, 1990). As with any process of rural transformation many vestiges of earlier periods remain as structural conditions shaping what can be done in subsequent periods.

The remainder of this paper offers an initial attempt to apply the livelihoods approach to rural Canada. In this way an ecological dimension is introduced in the form of the bio-region constituting the agricultural lowlands of southern Ontario. Combined with a strong manufacturing base, rural southern Ontario offers an example in the Canadian context of a diversified rural economy.

The Canadian Context

In Canada we cannot look at Sustainable Livelihoods (SL) as a template, at least not at this stage. It is more useful to look at SL as "a technique for thinking." The main question is whether the SL approach adds to a new or better understanding of rural life and complexity in Canada.

In the Sustainable Livelihoods approach, livelihoods are seen based on capabilities, assets, and entitlements which people use to make their living. These are accounted for and measured in the most part by activities.

"Sustainable livelihoods are those which can cope with and recover from shocks and stresses and be economically effective, socially equitable, and environmentally sound." (N. Singh, 1998).

Distinguishing between coping (short term) or adapting (long term)to shocks and stresses introduces the essential dynamic in the SL concept. A livelihood is sustainable if it allows for coping in the face of a shock or a stress and is capable of adjusting over time. This set of concepts suggest flexibility, resilience and recovery, terms that connect the SL concept with the dynamics of ecological systems. This enables us to begin to sort out patterns of livelihood sustainability into paths, as suggested in Figure One.

What remains by way of introduction in the "developed world" context is to recognize the essential characterizing features of what is rural.

There are three (3) key points in considering rural Canada:

Rurality
Rural Canada has a low population density; large distances between places, and a short development history ... 150 years in Ontario

Policy
Rural Canada has generally NOT been subject to spatial policy. Despite diversity of rural economies and communities, there has been very little attention given to rural areas, other than through sector policy.

Economy
Rural Canada exhibits a form of advanced capitalism in which jobs (wage labour) are commonly thought to be the mainstay of sustainable livelihoods. In this context the labour market is of considerable importance as it connects livelihoods to economy in a market system.

Rural Livelihoods: Then and Now

Livelihoods in Upper Canada at the time of settlement were generally like this:

Cutting and clearing forest land, the logging connected with this land improvement, making pails or tubs for the house, spinning, making linen for bags as well as for the house, making boots, mittens, and harnesses from the hides they had tanned on shares, splitting and making shingles for the roof, making cane furniture, melting pewter and making spoons with moulds, shoeing horses, leaching ashes and boiling lye to make potash for sale, labouring on public roads as required by statute, slaughtering meat for the household, transporting products to market and hauling in all building supplies, splitting rails for fences, and digging the well (Wietfeldt, 1976, p. 208).

Today a generic description of the structure of contemporary rural livelihoods would look something like this (Fuller *et al.*, 1999):

It has been observed that a household of four to five people might be engaged in three or four jobs (a mix of full-time, part-time, and occasional work). One of these jobs at least is likely to be home-based, someone will commute for up to an hour to work, one way; the household will have about five income streams, and it will have third sector (voluntary) activities, (including being on boards or committees for which expenses are paid), as well as engaging in social activities for themselves and their children which involve driving more than 100 kilometres a week.

There are two points we'd like to highlight from this contrast:

Both livelihood structures (Then and Now), although very different in kind, are similar in the fact that they are pluriactive, i.e., they consist of many different activities.

The two livelihood structures differ mainly in the space that they occupy. The settler livelihood is based on farm and local activities. The contemporary livelihood is based on a much wider "reach" to satisfy livelihood needs.

A major factor contributing to the complexity of livelihood patterns that grew up between the two time periods is that of "wage labour." In Canada, this became the common way to make a living after 1870 and gave rise to full time, non-farm employment, mainly for men, in rural areas. It is the increasing re-occurence of pluriactivity and the growth of self-employment that makes the structure of livelihoods once more similar to livelihoods of 150 years ago.[i]

Although this complex picture is drawn from southern Ontario, the idea in general is thought to be of similar dimensions across Canada.[ii]

Taking an assets approach, we first consider *agriculture*, as this is an important element of the Canadian rural economy. The increasing complexity of issues in agriculture relates to the assessment of assets at the household level as well as at the local and national scale. This is made more complex by the fact that there is a diversified rural economy in rural Ontario, and this rich opportunity base provides for household choices, but also for inevitable exclusions. Restructuring and governance must also be considered as these provides a framework for reviewing the role of space, a crucial element in sustaining complex livelihoods in rural areas.

2. AGRICULTURE as the base of sustainable livelihoods in agro -rural regions

Given the agrarian origins and economic importance of agriculture in rural Ontario, it is useful to look first at farming as a way to connect to SL thinking from the developing world where land-based cultures still predominate. Taking agriculture as one of the main sources of livelihood activity reflects the tendency to trace the role of the natural resource base as one of the main lines of enquiry in the SL approach.

What we mean by assets becomes largely a question of scale. In the SL concept the assets are calculated at the household level and refer to the many forms of capital that may be available. At the State level however, assets are the structural capabilities of the economic system to produce surpluses for satisfying national needs and providing exports. In farming there is just this differential assessment of assets depending on whether the question is posed as a national or local asset. On the one hand, the value of agricultural production is continuously increasing, even in constant dollars, whereas the number of jobs in farming is constantly going down. In terms of SL policy one would want to have as many people as possible supported, even modestly, by agriculture, rather than fewer but more well-off farms. We have both situations in southern Ontario at the moment, which can be referred to as the "dual economy." In terms of exports and competition in international markets, the fewer and bigger structures are most favoured. In terms of social policy, it may be better to maintain farm families in the countryside to avoid more migration to urban centres, where social costs (housing, crime prevention, unemployment) are greater. This is a stated policy preference in some parts of western Europe, for example.

Looking at the assets at the household level, it is appropriate to break up the range of assets into forms of CAPITAL, those capitals that people can use to construct and maintain a livelihood: financial, social, physical and human capital (DFID, 1999).To this list of capitals we would add entitlements as a form of resource. Variation in the characteristics of the asset base can be expected to result in variations in the livelihood strategies that households can effectively pursue. Variations in livelihood outcomes can thus be explained by identifying variations in the asset mixes. The evolution of livelihoods will be a function of the evolution of the asset base through time.

To illustrate the use of capitals in terms of farming as the livelihood base, one may take a look at human capital in the form of labour resources. For example, males have been moving out of agriculture for more than 100 years, first into waged jobs locally and then into the migration stream (towards urban centres or out West). Today there are more women farmers in Ontario agriculture than ever before. Most males in the countryside today work either in farming or manufacturing or are in trucking, probably the fastest growing occupation for men in rural areas.

How significant are these trends in terms of livelihood strategies? Is there mild feminization happening in Canadian agriculture and if so would it be useful to compare to other parts of the rural world where feminization of agriculture is common, e.g. the Caribbean (Gomes 199-)? These random features of human capital illustrate the nature of contemporary rural society and provide evidence of social as well as geographical mobility. In terms of the "capitals" debate, the question arises as to whether gender relations in labour disposition are significant in the maintenance of household livelihoods.

A key issue here is whether agriculture is actually losing jobs at all. It can be argued that agriculture is not only a wealth creator, but is also a job maker. Many livelihoods are embedded in the jobs that agriculture creates locally in the form of related activities. The recent research by Cummings *et al.* demonstrates the upstream and downstream businesses and jobs that are sustained, at least in part, by activities in the modern agro-food industry -- not only in farm supplies and processing, but in transport, insurance, storage and handling as well as business services (Cummings *et al.*, 1999).

Agricultural Policy

Traditionally, policy has followed the notion of "support agriculture and it will support the rural community." For example, this logic is based on the observation that in every good year a farmer will buy a new truck.

In general, 100 years of support for agriculture has been made possible politically by the public's positive image of the general healthfulness and efficiency of the family farm. The symbol of the family farm has been so well marketed: "hard-working farm families that supply the nation's food and export earnings." that political support for farming has always been assured. Support for education and training, extension, subsidies, bailouts, safety nets, and emergency relief as well as 4-H clubs, junior farmers, agricultural fairs, and the women's institutes have all been justified.

The state has had a major role in sustaining the infrastructure of this important sector, but recently, under the neo liberal agenda, has let much of its involvement go, allowing the private sector to become the arbiter of the sector's continued heritage and health. This has been a strategic shift and directly impacts the nature of livelihood sustainability in this province. It is in effect a vote for larger operations and a mean and lean business environment.

Today, 20% of the farms produce more than 80% of the value of agricultural production. With this dual structure in mind, the state has purposefully focussed on the top producers. Higher education is directed primarily at this group: extension services at OMAFRA field offices have just been cut to concentrate on the ministry's core business of economic development. Privatization and fee for service options will diminish the access to government services by the bulk of the people (80%) on farm land in Ontario.

Policy Considerations for Sustainable Agro-Rural Livelihoods

Using SL thinking, it is evident that if the policy interest is to sustain rural livelihoods, then one would do more by concentrating attention on the 80% rather than the 20% producers who, by definition, can look after themselves and are already using private sector services, etc.

The 80% remaining landholders make up the bulk of family farms and are the potential stewards of the natural landscape, preservers of rural heritage, and the promoters of rural enterprises and future land-based activities. In this mix lies the "diversity" that SL thinking supports: diversity of activities, attitudes and options to sustain the resources, both physical and human, that will be required for sustaining livelihoods and landscape into the future. This group, because of its mixed nature and diversity, will be better able to absorb the shocks and surprises that the market system will produce. This expression of human and physical capital, together with the capacity to generate major exports mainly through the top 20% producers forms the main economic base of agro-rural Ontario today.

In this scenario, a key entitlement is that people have the right to live and work in a rural area by husbanding the land resources in responsible ways so that a variety of livelihoods and communities can be sustained. Is a new form of "right to farm" legislation required, to establish compatible relations between the two components of the dual economy and between them and rural society at large.

It is also in this context that the image of the family farm may need to be refurbished to reflect the needs and interests of society at large. The family farm image that makes most potential (and political) sense right now is that of being the provider of "safe food" in the context of sustainable use of natural resources in the countryside. If it is not in the interests of the 20% to incur the trouble and costs of channeling commodity streams to enable the labelling of foodstuffs, then the initiative should come from the 80% and with it the many rewards of sustaining a variety of livelihoods and rural communities well into the future.

By supporting entitlements (the public good), policy indirectly supports the capitals that make up the assets of agriculture. Policy support for the entitlement that Canadians should have the right to choose the foods that they want, and that therefore labelling of foodstuffs at the retail level be mandatory, might do more to support farm-based and food industry livelihoods than any number of safety nets. Together with a program to help diversify the land-based activities of the 80% of landholders, such policy could lead to a more healthy physical environment as well as more livelihoods; in essence, more sustainable livelihoods.

Sustainable Livelihoods In A Diversified Rural Economy

What emerges from this single sector view is that livelihood structures and stratagems have changed a good deal in recent years. It is probably the same in all sectors. To gain a broad understanding of the whole picture it is necessary to look across sectors to understand the connections between them and the complexity that arises as to how rural families make their livings. One way to do this is to consider the evolution of livelihoods, together with the impact of technology, over time. This technological evolution might be characterized as moving from the horse (1) to the automobile (2) to the computer (3) (Fuller, 1994). These are vast changes which *nevertheless* are being played out in the same geographical space. What emerges is the increasing complexity of people's lives, the increasing "reach" that is necessary to maintain rural populations and the different processes of exclusion that have arisen. The question of how sustainable – and how supportable -- such complex livelihood patterns are is one of the main questions for policy and research in rural Canada.

In research work by Fuller (1994) he discusses the complexity of livelihood patterns using the term "Open Society." The Open Society, characterized by the computer, has overlaid previous historical and geographical phases which have been called the "Short-Distance" (horse-drawn) and "Industrial" (car-driven) societies. By taking a historical and geographical perspective such as this, policy and research in the area of sustainable livelihoods in Canada gains the opportunity to focus on space as one way to understand clearly assets, entitlements, and policy options in rural Ontario communities. Further work on household activity patterns (Fuller et al 1999), demonstrates the diversity of livelihood patterns and the reliance on the automobile for accessing the needs and opportunities of a satisfactory life. How sustainable the automobile is in the long run becomes the inevitable question, given the stress associated with commuter travel, the increasing cost of fuel, and the impact of greenhouse gases on the atmosphere.

Consider, for example, the following mix of assets and entitlements questions. In southern Ontario, there are as many activities (formal or informal, for-profit or not-for-profit) in services and manufacturing as there are in primary activities. The mix of activities and the possibilities for assembling livelihoods in many different ways is probably incalculable. In terms of trends, in 1994, a conference in Goderich (Huron County) discussed the end of manufacturing as we know it in rural areas (CRRF, 1994). Today, in that same county, manufacturing is as strong as ever, although the mix of manufacturing activities is a blend of old and new, with small and medium enterprises being the main form of new business opportunity. Across the province, the making of automobile components has become the mainstay of the manufacturing sector in many rural areas.

The changing characteristics of the labour market are also of note in describing the complexity of the rural livelihood mix. Work among the professional classes has intensified, with increasing demands for productivity gains in response to restructuring. Contract jobs are the other norm, being short-term, insecure, and dispensable. Increasingly, career paths are not linear, but flexible and disjointed. Baby boomers are likely to have had up to five career changes in their work life. More educated women are having children later. And so the changes go on, and all of them to some extent influence the options that households see as ways of sustaining their livelihoods at any point in time.

Not all members of rural society are included in this renewal of livelihood options, however. There is evidence that there are many traps for the poor, the inflexible, and those not willing to move or who do not have the means to travel to work. This highlights the distinction between "good" jobs and "bad" jobs. The need for child care in rural areas to release more women into the work force or to recognize the value to society of homemakers are other issues that will influence the range of options that people feel are open to them. There are also many issues around the stresses associated with lifestyles that consign people to travelling long distances daily, to holding more than two jobs and to always looking for security. Pluriactive lifestyles may suit some, especially at certain stages in the family lifecycle, but are going to be very difficult to make sense of or to sustain for others.

This introduces the notion that livelihoods are not simply about job security and job quality in rural areas. There are increasing numbers of people who recognize the dangers of a frenetic workstyle and who are opting consciously to mix the livelihood assets with deliberately more relaxed activities to produce a *sustainable* pattern of activity that makes sense for them. This might mean mixing home produced foods with bought foods (note the growth of gardening and horticulture over the last decade), alternative education (homeschooling is expanding rapidly in Ontario), and passive forms of recreation such as walking, Nordic skiing, and birdwatching. These activities, while on the one hand represent lifestyle choices for increasing numbers of people, also means, on the other, that the opportunity is there for supplying services and stimulating the local economy.

Conclusion

Livelihood is precarious. Sustainable livelihood as a policy goal requires macro theory to guide policy formation and macro institutions capable of creating and maintaining the structures supporting asset creation and flexibility.

Knowledge about individual and household livelihood options and livelihood strategies is a crucial starting point. Just as the development debate was characterized by overly theorized and under contextualized policy prescriptions and development agendas, so rural livelihoods in developed countries have been left to the opportunities that fall out of the advanced industrial economies.

It will not be possible to build sustainable livelihoods for all citizens in the absence of an effective state that can serve as the medium for the creation of social supports and assets essential to the development of individual assets and the weaving together of successful individual and household livelihood strategies. Hence the pursuit of sustainable livelihoods should be conceptualized as one developmental agenda among many. A parallel agenda concerns the necessity to maintain coalitions willing to make sacrifices for collective ends. While the need to work with the state is generally recognized., less well recognized is the erosion of the state as a mechanism of social asset creation and redistribution. In particular it is essential to recognize that the state is the most effective barrier to international market forces which can easily degrade the potential for livelihood sustainability in even the most developed countries.

The construction of sustainable livelihoods is not only a problem in micro management; it also partakes of the macro agendas of nationalist and socialist development that were articulated in the immediate postwar era. Sustainable livelihood analysis needs such an encompassing vision because the forces that are shaping livelihood options are increasingly operating on a global scale and only a macro perspective can reasonably be expected to survive a strategic engagement. The new concern with micro development should be viewed as a positive addition to the agenda of social solidarity and liberation that has mobilized progressive development practitioners over the postwar period.

Summary Points To Think About

Livelihood Assets: Livelihoods in rural Canada are influenced by a myriad of forces and conditions which collectively represent a wide variety of choices. We may refer to the complex patterns of activities that result from these choices as pluriactivity.

The fact that for most households there are a variety of choices means that the asset base for most livelihoods is rich and varied. This richness has evolved over time and is highly complex.

Exclusion: the variety of choices is not available to everyone. The working poor, rural youth, and low-income seniors, for example, are vulnerable to the limits that some forms of services have in rural areas. Youth and seniors have transportation problems, for example, and much depends on whether the social support system is adequate and itself sustainable.

Complexity is a characteristic of rural livelihood patterns. Complexity is born out of the rich asset base, the evolution of livelihoods over time which has mixed self-employment with wage labour options and home-based businesses with distant labour opportunities.
Agriculture is still a critical component of the rural economy and provides a variety of livelihood options both within and without the production end of the food system.

Manufacturing is alive and well in rural Ontario and will continue to sustain male jobs (mainly) in the traditional full-time sense for as long as the Canada-U.S. Auto Pact remains intact.

Services provision will remain a strong component of rural livelihoods in Ontario into the future: servicing the population, servicing the businesses, and supporting the civil structure. Avoiding too many Mac-jobs will be the problem.

Mobility is a characteristic of rural households – vehicular mobility of people for work, social, and recreational activities (including volunteering), and mobility of knowledge and information through the personal computer (Internet), etc.

Rural livelihoods are dynamic in that the mix of activities and the space covered to satisfy needs is constantly changing.

Research Parameters: Space is a key differentiating factor which characterizes rural livelihoods between urban and rural, and among rural livelihoods themselves. Multiple job-holding, accessing learning opportunities for children, maintaining social relations, and provisioning the household all demand a wider use of space, probably in a number of rural centers over a given period.

Researchers should look more closely at what people do to sustain themselves and learn from the patterns that emerge, rather than promote normative solutions. These tend to delimit livelihoods to those with mobile forms of capital, such that those without such assets will be easily marginalized.

Space is also important in terms of how civil society is administered and organized. Health, education, and local government all occupy spaces larger than the original municipalities (towns and townships) and give rise to a regional scale of administration that reflects the Open

Society and the sorts of "reach" that households need to sustain a livelihood. Given the new medium scale of rural administration and governance, it might be fruitful to explore the watershed as an appropriate scale and unit of analysis.

Policy Considerations: Whether family farming will remain a common option as a livelihood choice for many people is debatable. The image of the family farm needs refurbishing.

At the local level, the governance question becomes important. In an era of decentralization and "downloading" of government services, it is essential that monitoring of the effects of restructuring be undertaken by central authorities to ensure equity of impact and a sharing of opportunities.

Governance is a central component of sustainable livelihood thinking in the Northern hemisphere. Much can be done to address the livelihood questions in rural areas by developing policy that is spatially based and particular to the sustainable livelihood needs of rural regions and communities.

Rural policy is needed to contend with space, exclusion, equity, and sustainability.

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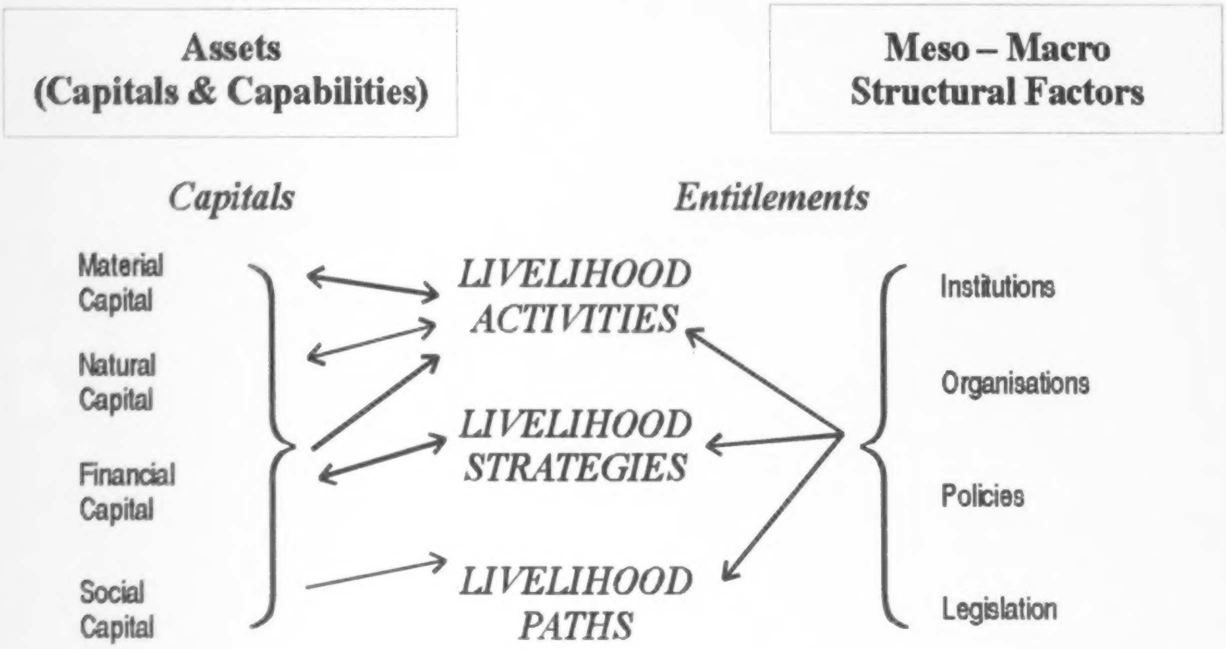
Sustainable Livelihood Model



Assets
(Capitals & Capabilities)

Meso – Macro
Structural Factors

Capitals

Entitlements

Material Capital

Natural Capital

Financial Capital

Social Capital

LIVELIHOOD ACTIVITIES

LIVELIHOOD STRATEGIES

LIVELIHOOD PATHS

Institutions

Organisations

Policies

Legislation

Fuller, Devlin, Small and Johnson

Local Initiatives – Global Imperatives: South West Victoria Responds

Kevin O'Toole, Australia

Abstract

The implementation of marketisation of public policy has impacted very directly on local quality of life in regional Australia. Competition policy initiatives enacted by each sphere of government have resulted in changes to the financing, delivery, and regulation of local public infrastructure. This paper looks at the outcomes of marketisation of public policy upon one regional local government area in South West Victoria. First, the paper locates the marketisation of public policy in its global context. Secondly, there is an analysis of the initial impact upon a group of local governments. Thirdly and more importantly, the paper discusses some of the ways in which local initiatives have attempted to counter the negative effects of marketisation policies upon their local area. The paper concludes by arguing that while the effects of globalisation upon many rural shires has been alarming, there are some lessons to be drawn from these local initiatives.

Map of Shire of Moyne
(Editor's note: This map did not transfer; please contact the author for the original graphic).

The landscape of southwest Victoria has undergone considerable change over the past two hundred years. In the first place the white invasion of the land led to the displacement of the indigenous people and significant deforestation (Critchett, 1992). As a result of the increasing demands of British textile production the pastoral industry established large sheep properties and transformed the landscape to meet the needs of the new settlers (McMichael, 1984). Small towns were established to service the pastoral industry and other new agricultural enterprises. These towns were the links in the transport and communication routes to serve the global markets for textiles.

They also provided the other developing infrastructures for European social organisation especially the local agencies of the colonial government. This state intervention in the nineteenth century has been termed one of 'state socialism' or 'colonial socialism' in Victoria (Eggleston, 1932; Butlin, Barnard, & Pincus, 1982). There were three features to this colonial socialism. First, because private capital was small and limited, public ownership was favoured, as it could attract the necessary resources for such long term ventures (Wells, 1989). Second, state institutions could subordinate and control wage labour (Wells, 1989). Third, the state owned a significant amount of landed property, and acted as landlord and gained direct reserves from government enterprises, land and customs receipts (Butlin, Barnard, & Pincus, 1982). The result 'was the widespread public and private acceptance of strongly supportive role of government vis-a-vis major private investment through direct market participation by government' (Butlin, Barnard, & Pincus, 1982, p. 13).

The agricultural sector was buttressed by a number of state schemes, aimed at supporting the ideal of the "yeoman farmer" in Australia (Powell, 1989) The early land reforms of the 1860s and the soldier settlement program after both world wars have been driven in part by the paternalisation aim of establishing the "family farm" (Butlin, et al., 1982). These coexisted with the larger farms of the squattocracy, and the migrant - specific farming localities such as the Irish around Koroit. The "countryside" had a mix of competitive activity, subsidised by the state in the agricultural sector, and supported by the state initially in infrastructure support.

Local government administration was also established and the initial limitations on the population size and area meant that incorporation was virtually restricted to townships (Larcombe, 1973). Restrictions on the property franchise and on rate collection had the effect of limiting local government to smallness in size, population and income, thus reducing its political relevance (Barrett, 1979). The overall outcome for areas like south west Victoria was a landscape dotted with small towns serving the interests not only of local settlers but also the global market in textiles.

Following the second world war a second wave of globalisation began with the transnationalisation of domestic (civil) societies (Allen, 1995). As the first wave of globalisation had helped to reshape the landscape of the south west so the second wave also helped to reshape the landscape. When state support for the pastoral industries began to disappear in the new 'free market' environment the buoyancy of the sheep industry also began to wane. Innovations in textile products in the global market required that local commodity production in wool was subjected to increasing pressure. The decline in the number of farms may be seen to result from this process (McMichael, 1994).

The growth of corporate capitalism in Australia saw an initial expansion of capital inputs into local areas. However, this process was an uneven one. Corporate activity invested in a number of different production activities (Mullins, 1981a). Manufacturing had been generally located near to the major port of Melbourne because of cheaper costs in terms of transport and fuel (Linge, 1979). This is also where the labourer came to reside and after World War 2, when the new migrants came to work in the developing industries like motor car production (Birrell & Birrell, 1981). Thus manufacturing investment was generally located in and around Melbourne. Food processing industries were more often located in non-metropolitan Victoria simply because of the location of food production. In south west Victoria this has been evident in the large recent investments in the milk industry. Another recent product has been the growth of the timber industry in south west Victoria. Ironically, where the first invasion saw the deforestation of significant parts of the region the new invasion is displacing old pastoral runs with the new forests. This is being accompanied by displacement of the white settler population some of whom trace their lineage back to the initial invasion.

The limited role of the state together with new communications and transport innovations have meant that small towns in south west Victoria has been significantly disadvantaged in the new wave of globalisation. Where the state was once supportive of small local infrastructure the dominance of new discourses of 'small government' has meant scaling back state investment (Pusey, 1991; Carroll & Manne, 1992; Castles, Gerritson, & Vowles, 1996). To accommodate to broader global changes there has been a shift in the required social and physical infrastructures which has been the case in south west Victoria. Where small towns were once the lifeblood of local communication and transport they are no longer necessary. Approximately 40% of Australia's small towns are dying, losing population, local businesses and government services (Jackson, 1999).

The remaining inhabitants of these small towns are not willing to let their communities die. There is a strong commitment to rebuild the social and economic capacities of their towns. In most instances this means reinventing their localities to attract new investment through 'local economic development' and 'place marketing'. These are small in scale but are nevertheless meaningful to the local inhabitants who are attempting to redefine themselves within the changing processes of a 'local state'. That is the reliance upon the local state to supply basic infrastructure and capital for local town maintenance has been replaced with a new approach of market self reliance. Local development has become local entrepreneurship where all forms of capital are exploited for the main goal of 'economic development'.

This paper looks at four towns in south west Victoria in the Shire of Moyne and analyses the processes involved in rebuilding local social capacity. In each case it is voluntary associations of local citizens intent on reinventing their towns who drive the process. Their aim is to reinvent their town in the hope of attracting new investment. However, the argument of this paper is that the incorporation of the wider political discourses into the local state leads to the infusion of 'local economic development' with meanings that take local political practice onto a scale that is often beyond its reach.

The Local State

Engagement with the state involves confronting different levels of authority. In the Australian system there is not only the federal structure of the Commonwealth and the States, there is also local government. But local government is not the only deliverer of local services. While the democratic notion and closeness to the people of local government has been idealised, the reality is that its functions, and even its form are largely determined outside the electorate by higher tiers of government (Clark, G. L., & Dear, M. 1984, p. 132) In this sense local government is theorised as part of what has been termed the *local state* (Cockburn, 1977; Duncan, & Goodwin, 1982; Duncan, & Goodwin, 1987; Fincher, 1989; Gottdiener, 1990)

The local state exists within the realm of consumption politics. Its influence has been confined to collective consumption which brings people together as consumers of state services, rather than as workers seeking such services in the market place (Dunleavy, 1980) The functional areas in collective consumption according to Castells (1976) are education services, health services, environmental facilities, human services, cultural facilities, highway, public housing, land use regulations and urban planning. The local state does not initiate large scale change but becomes an outlet for the collective consumption policies of the central state. Generally, sections of the local state, local government especially, act as advocates for special local interests, pleading with the centre for "catch up" resources to support their local competitive sector.

The local state incorporates some notion of spatial identity. It is not something that exists as a theoretical construct which is imposed upon a specified location. The local state has some geographical identity, administrative structures and some electoral base. As Massey (1995) has argued the drawing of boundaries is a social act to enable administration and once drawn create a level of identity especially through the electoral base. But while the local state is not bound by absolute geographic boundaries for any combination of services, it can usually be delineated by a local focal point around which local constituents can receive services. Thus *local* means the nearest point of service for any level of public service regardless of the level from which the service emanates. Accordingly, local state regulation and services are delivered by localised state activity. While one level of government or non-government organisation may deliver the service, the initiation and funding for the service may come from a different level of government.

Much local service provision emanates from the local government administration. However, that same area is serviced by central government agencies which locate their service delivery on boundaries that may extend beyond any one municipality to a cluster of municipalities, in what are local "regions". Accordingly, state local services and state local regulation is delivered by localised state activity. Thus while there is a local government, there are also other specific agencies with local representative systems which work alongside local government to form a hybrid "local state". For Stanyer (1976), to isolate local government as a political entity in itself which can be studied in the same way as a nation state is to miss the essential interdependence of local government in a local state structure.

Localisation can take place in many forms. The most obvious manifestation of local service and regulation is the Local Government Authority (LGA). This basic service deliverer and regulator, has an electoral base. However legitimacy does not derive from the "people" but from the central state through a Statute of the Central Parliament as there is no separate constitutional power given to local government. Local elections take place, and may produce politics over local issues, however the scope of local government is prescribed by central government, and can be overruled by central government agencies (Kiss, 1999). This is not to deny the importance of Local government in managing local conflicts. It is this conflict management role of local government which makes local government such an important part of the local state.

The local state also consists of local branches of the central agencies. This is especially so in the service and regulatory agencies. These agencies establish their own geographical boundaries which are not necessarily coincidental with LGA boundaries. The degree to which the local branches have local autonomy is usually very minimal and this applies to local policy making as well as the use of discretionary funds. The local branch is usually answerable to the central government on all matters, and has little in the way of input into the policy framework. Coordination of different agencies at local level is usually absent.

This 'localising' of the central state has been characterised by the establishment of new structures alongside the existing local institution of local government. While local government has been invited to participate in these structures, the central mechanism has remained firmly with the centre. Local government is rarely trusted to develop new policy initiatives under its own auspice. The trappings of government responsibility in terms of a local electoral base have existed for over a century, however the central state localises itself not by passing on responsibility to a locally elected government, but by incorporating that locally elected body into its own localised structures.

If we extend the meaning of politics into everyday activity it becomes possible to understand the relations of power at local level (Mouffe, 1979). The state becomes more than an administrative apparatus and state activities can be seen as *practical* as well as *technical* (Migliaro, & Misuraca, 1982) In this way the state is not reduced to administrative activities, or what may be termed the practical exercise of power, but also involves activities such as producing ideologies, information and knowledge (Migliaro & Misuraca, 1982). In this way the local state acts within the broader framework of politics. As Gottdiener notes, there is both a social process and a structure involved in analysing the local state (Gottdiener, 1987).

The rural local state

The local state in rural Victoria suffers in much the same way as the local state in metropolitan Victoria. That is the effects of politics associated with economic globalisation and neo-liberal approaches within the state result in uneven economic development in local economic environments. The investment activities of public and private corporations are unevenly distributed, such that different local areas receive different costs and benefits. Corporate activity leads to more centralisation of control over economic decisions which in turn lead to more "efficient" use of resources. Efficiency often means more labour-saving devices as well as control over large shares of specific markets. This can be seen in areas such as retailing, where large "one stop" centres, with cheap pricing structures gradually out compete small local retailers. The decline in many small towns retailing sector has been accompanied by the growth in provincial towns of large corporate retailing. The decline of small retailing in small towns has been proceeding apace over the past decades however the decline in small retailing is occurring in provincial and metropolitan areas as well although the impact does not appear to be as severe as in a small settlement.

Technical innovation has also brought with it a significant number of new production processes which directly threaten the small local sector. For example the increased use of new technological processes has contributed to a decline in the workforce in smaller settlements. Where the telephone exchanges had opened up employment for local people in the early part of the 20th century, now, as the century draws to an end, these jobs have been replaced by the new technologies. As railways have given way to road transport, local employment in railroad infrastructure has disappeared. As more resources are channelled into high technology medicine, so low profile bush nursing hospitals disappear. As the state and corporate sector "rationalises" its activities into more labour saving processes, so the need for local collective consumption declines and local schools begin to disappear into provincial centres.

Corporatisation and privatisation of utilities at both state and federal level also affected regional Victoria especially in electricity, water and telecommunications (Costar & Economou, 1999). Further, government reforms to the public sector have meant the reduction of government agricultural services to regional Victoria, a function that affects major areas of production (Alford & O'Neill 1994). The downsizing in private sector provision of such activities as banking has also reduced services in regional Australia (Beal & Ralston 1998). All in all many communities in regional Victoria have been severely affected by government policies that rationalise the use of local labour (Ernst & O'Toole 1999).

Again this process is no different in metropolitan or non-metropolitan Victoria. The results are more obvious in rural localities where the disappearance of a variety of state and corporate jobs not only means a decline in the local economic sector, but often a complete demise; towns disappear altogether. In metropolitan Melbourne, 'local' economies are not differentiated by such clear geographical boundaries. As corporate activity replaces small-scale labour-intensive productive processes, so the need for new avenues of employment arise. However, the 'new' employment does not require decentralisation like previous state and corporate activities. Accordingly, as populations decrease in small towns, so the need for other state services declines as well.

The local state also loses resources in this process of structural change. Small local government areas could once use their small urban areas as outlets for central government agencies thus supplying much of the 'local state' infrastructure. However, the decline of many localised services offered by central governments, especially in the labour force and the greater reliance on provincial centres for many local state activities has meant that the local state in rural Victoria has become more centralised around larger provincial centres. Reducing the number of local government authorities from 210 to 78 has also meant that local government infrastructure once based upon small towns has disappeared (Kiss, 1999).

The activities of farming in the local sector are also subject to a good deal of corporatisation. If the farm itself is not owned by corporate enterprise, then often the produce of the farm is subject to contract arrangements with corporate processors. The small competitive farmer continues to exist, but unless equity in the farm is reasonably high they are subject to the continued pressure of financial corporations.

What is being described here is the process of uneven economic development which applies to the economy as a whole (Harvey 1989). In this process localised social and economic activities are constrained by non-local factors, especially in terms of capital investment (Duncan, Goodwin, & Halford, 1988). This results in locational shifts of investment not only from one geographic location to another, but also from one sector to another. In so doing, more efficient means of achieving profitability emerge in a number of cost saving activities, especially with regard to labour. The outcomes of the process are more obvious in rural areas, where it appears that whole communities disappear, together with many of the social activities in which that community indulged. Much of the investment in such capital works as sporting fixtures, community halls and other such local government facilities lies idle. Uneven development is essentially a social process. However, its impact upon the 'local' state in rural Victoria leads to more obvious manifestations of decline than in metropolitan Victoria, in that settlements disappear off the map. In metropolitan Victoria the impact may be as severe, but the settlers have nowhere else to go.

Shire of Moyne in uneven economic development

The Shire of Moyne was created from the former Shires of Belfast and Minhamite, the Borough of Port Fairy, and parts of the shires of Mortlake, Warrnambool, Dundas, Mount Rouse and Hampden in September, 1994. The Shire is mainly characterised by agricultural production with dairying, sheep and beef grazing, cereal crop growing, potatoes and onions as the main pursuits. It also has significant export industries that include bluestone products, baked products, pharmaceuticals, seafoods and a large multinational presence in processed dairy foods. Over the past thirty years there has been a shift in the importance of the major products of the Shire as the following table shows.

There is a substantial drop in the number of sheep in the Shire which is indicative of the wider wool crisis in Australian farming. Similarly the increase in the number of milk cows indicates the expansion of the dairy industry in region that has been driven by the major investments in dairy processing. Workers in the milk processing have also increased from 87 in 1971 to 136 in 1996. The Shire is serviced by one large multinational (Nestles) and three other large corporations (Murray-Goulbourn, Bonlac and Warrnambool Cheese and Butter, formerly Kraft). All of these companies export milk products to the rest of the world.

While there has been a decline in the number of farms there has also been consolidation of smaller farms into larger ones especially in the dairy industry. Farmers in the sheep industry have also diversified into other forms of farming and most recently canola for the expanding canola oil market. However overall the number of farmers in the Shire has declined as the following table indicates.

Since the small businesses of the local towns are dependent upon the input from the farm sector, any changes in the types of farm and more especially the number of farmers will heve significant impact upon local profitability.

The change in population of the four main centres in the Moyne Shire have had differential outcomes over the past two decades.

While there has been a decline in three of the towns from 1971 to 1996 the share of the total population in the countryside has declined even more rapidly. The one exception is Port Fairy that had an increase in population due mainly to two factors; its position as headquarters of the Moyne Shire and its 'discovery' as a recreation village for the rich.

A resulting problem associated with population change has been the cost of housing in the towns as the following table indicates.

The price rises in Port Fairy reflect the changing nature of the ownership in the town. Much of the accommodation is now being bought by Melbourne based professional and business people who use the town as a holiday resort. Koroit has also been 'discovered' by Melbourne based people but it is also becoming a dormitory suburb of nearby Warrnambool. Mortlake and Macarthur on the other hand have suffered from the loss of government services and the surrounding downturn in the wool industry. Unlike Port Fairy and Koroit both Macarthur and Mortlake are not on the 'tourist trail'.

Declining property prices are important for local inhabitants as it is often the only major source of collateral people have for investment purposes. Further any investment in the town is based upon the risk related to the return to capital and in towns where capital stocks are falling there is little likelihood that banks will supply the capital loans for investment.

Over the last decade the area that now constitutes the Shire of Moyne has suffered significant changes to its services. Major local state services have been withdrawn from three of the main population centres. The Koroit merger with the old Warrnambool Shire in 1985 was a voluntary process but the mergers of Mortlake Shire and the Minhamite Shire into the new Moyne Shire under the Kennett government were forced mergers. Both raised the ire of Mortlake and Macarthur residents who lost most of their local government facilities, staff and equipment as well as other state government agencies.

The area serviced by the Shire also had four major hospitals which have all undergone significant change over the past decade (Mahnken, Nesbitt, & Keyzer, 1997). The Koroit hospital has been reduced to a nursing home facility. Macarthur hospital lost its acute care hospital and GP at the same time and has been reorganised as a community outreach centre. Mortlake has had its hospital amalgamated into the Terang-Mortlake Health Service. Only Port Fairy has maintained its hospital, but it has been reconstituted as the Moyne Health Services and has incorporated acute care, nursing hostel and day care facilities under its auspices. In an attempt to avoid incorporation into the nearby Warrnambool Base Hospital, the management and board of the Port Fairy Hospital have negotiated a deal with the government to be part of a 'Health Streams' pilot project.

The Shire has also lost a number of schools and others have amalgamated. Nine small rural schools closed between 1993 and 1998 and two other primary schools have been amalgamated with local secondary schools in Mortlake and Hawkesdale to form what are known as P12 schools (Victorian Education Department 1992 & 1998). The loss of schools, hospital functions, local government facilities and other government services is demonstrated in the drop in government employees in the Shire from 289 in 1986 to 169 in 1996 (CData 1996).

The effects of private sector downsizing have also been felt in the Shire. Banking facilities in the smaller towns have generally been wound down. Macarthur lost its last major bank while the status of the Port Fairy bank was reduced and the management services transferred to Warrnambool. Koroit had its bank reduced to two days trading. Added to the decline in service delivery, there has been a 5% reduction in the labour force in the Shire over the decade from 1986 to 1996 (CData 1996). This is despite the expansion of dairy processing with its multiplier affects, especially in areas like transport.

The reaction of communities to loss of services in the Shire has been universal anger. However, that anger has been changed by the growth of a number of development groups in the Shire. There are three significant groups that have arisen over the past two years; Macarthur Advancement Development committee or MAD; Koroit Development Association (KDA); and the Mortlake Community Development Committee (MCDC).

As an organisation MAD attracts a good deal of local support. One of the most significant events for MAD was the closure of the local bank. With the assistance of the Moyne Shire Council, especially the mayor, Macarthur was able to replace its bank within twelve months with an 'agency' from the Bank of South Australia. By using a local business that opens seven days a week from early morning to late evening, the people of Macarthur were able to achieve a seven day a week banking operation. However, other aspects of retail banking such as loans and credit facilities have to be negotiated outside of the town.

The Koroit Development Association (KDA) grew out of a community committee established to oppose a bio-solids waste plant near the township. The group succeeded in its opposition to the plant and the leadership then focused its attention on local community development. The leadership of KDA was also able to replace the 'established' councillors on the Moyne Shire council. Such a move has given the KDA access to significant local decision making that has opened the door to more resources. One important feature of representation has been access to knowledge and information about broader funding sources for local community development. Most recently the KDA was able to convince the Shire to purchase the local community centre to house a local enterprise development centre.

The Mortlake Community Development Committee (MCDC) grew out of community reaction to three significant events in the town: the closure of the hospital; the relocation of the Shire Office to Port Fairy; and the relocation of the primary school to the secondary school site, establishing what is called a P12 School. Following two mass meetings of around one hundred concerned citizens in November 1996, the MCDC was established with a working group of fourteen people who were 'charged with being the watch dog and a point of voicing community concern' (MCDC, 1997).

The MCDC soon went beyond a watch dog role to a proactive role in local development of the town. To maintain momentum the MCDC invited speakers to the town, especially from the executive level of the Shire and the Health Services. These speakers were deemed to be an important strategy in turning the anger of the community into constructive ways of re-establishing the town. At the same time contacts were established with local and regional organisations that showed some promise of offering assistance to the town. This assistance was not purely financial but rather in terms of supportive ideas, contacts and networks that would allow different sections of the community to engage with the town. These groups included tourist associations, adult education groups, land protection authorities, health services, local water authorities, arts councils, rural counselling services, the local university campus, local governments, and government departments at state and federal level such as Natural Resources and Energy and the Primary Industries and Environment.

Unlike the other towns Port Fairy has not developed any home grown voluntary groups whose charter is the development of the town as a whole. Since Port Fairy has retained and expanded the bulk of local government infrastructure in the amalgamation into the Moyne Shire it has not suffered the same community 'shock'. Further, Port Fairy has been 'discovered' as a playground for the wealthy who invest heavily in local real estate. The 'discovery' of the town is attributable not only to the towns romantic appeal as a small fishing village but also to earlier attempts at 'place marketing' through the Port Fairy Folk Festival.

Local economic development and place marketing

Cochrane argues that 'local politics is increasingly about economic development and place marketing as much as, or more than, the delivery of services' and the experiences of the towns in the Moyne Shire are no different (Cochrane 1995, p. 267). At the Moyne local government level there is an economic development officer whose role it is to ensure that the shire is 'developed' as a whole. There is no particular local towns strategy although the shire has been receptive to ideas that have come from the local development committees.

The role of the local state in economic development has been on the agenda for a number of years in Australia (Cutts 1989; Garlick 1997). The Local Government Minister's conference in 1987 suggested that local government: 'can adopt the mantle of local ombudsman ensuring that commonwealth and State departments are responsive and sensitive to the needs of local groups and organisations, business and industry. They can also actively support wider economic and social issues. The advocacy role will be strengthened to the extent that local governments can demonstrate community and business sector support for their position, and put forward realistic and achievable remedies' Task Force of the Joint Officer's Committee, Local Government Minister's Conference, p. 42-43).

This type of approach is often referred to as a 'Bootstraps' strategy that purports to 'stimulate enterprise, rebuild community and re-establish some autonomy for the local economy' (Eisenschitz & Gough, 1993, p. xiv).

Even though there is no typology of local economies and therefore no strategy for local economic development small localities still assiduously look for 'models' that they can emulate. What develops is a local competition between adjoining localities for the economic development dollar. While the local communities wish to maintain their own local identity in their own surrounds what happens is that their town is transformed into a commodity (Pickvance, 1990). There are those whose memories of place tie them to particular ways of constructing local space who resist the reshaping of their local place by outside forces. But others whose towns were developed for previous eras of communication and transport try to reinvent their past by commodifying the collective memories into activities like tourist ventures. The landscapes both natural and built are refurbished in the hope of recalling the spiritual sense of old social practices in what becomes a virtual reality of a past that no longer is (and possible never was!) (Lovell, 1998). Collections of artefacts from the past (museums) are employed in the present as embodiments and representations of social practices that are recreated to give meaning to the present sense of local identity.

What is involved is 'place marketing' where localities are refashioned and redesigned (Cochrane, 1995). The dead are not only resurrected but commodified in the local museum as members of an enduring local social practices (Lovell, 1998). The productive activities on which the dead were dependent may no longer exist but they may be utilised to attract tourist capital to the locality. In Mortlake the MCDC have sought funding to develop a national soldier settlement and war memorabilia museum. Other dead are conveniently forgotten since they are not part of the preferred memories of the locality. In this process all the diverse meanings of the local built environment 'tend to be obliterated by the bland marketing of these artefacts aimed at the mass market' (Eisenschitz & Gough, 1993, p. 155).

Local 'events' are also a means of attracting tourist dollars to the town. The Koroit committee has developed a number of local events especially the annual Irish Festival that fits with long family connections to Ireland. The festival is now into its third year and continues to attract larger numbers of people from outside the region. Mortlake also has a Buskers Festival which has now been running for seven years.

The competition between the towns is also institutionalised through the 'ward' system of local government election. Representing local communities where small towns are located means securing resources for the constituent localities. Identification with locality is restricted to the scale of small town and reinforced through the notion of local development committee.

Conclusion

The emergence of local groups like those described above was dependent upon the impact of the changing economic circumstances and central government policies. Where once many rural communities were dependent upon the allocation of resources by central governments to their locality on an on-going basis, they now depend upon competition with other communities for resources. In the past, the response by local communities to loss of government services has led to delegations of local luminaries trekking off to Melbourne or to the local member's office, where they could usually negotiate some resurrection of the lost service. But all this has changed. The once 'taken-for-granted' services of education, health and local government provision have either been removed or transformed to meet the criteria of economic indicators established by the central policy makers.

Those places that have seen services removed or renovated have reacted angrily at first and in some instances like those described above, there has been the emergence of local survival committees. The attempted transformations of the towns are an apparent response to local economic changes. But the local state has transformed these local towns from being centres of public service and local commerce into local commodities that need to compete in the market place for their very survival. The discourse that supports policies that send the nation state of Australia into the global world as 'local' competitor is transmitted in an unrefined sense to the 'local' towns through the medium of local state. Local economic development discourses shift the local state away from pure administrative activities to the practical exercise of power by transforming local community development into an economic exercise. In this way the local state acts within the wider framework of politics by enmeshing local practices into a framework of the 'global' which is way beyond the local scale.

The small towns discussed here were once essential links in the communication and transport of the region and thus a part of a larger co-operative process. There is no reason why these small towns cannot use the new communication processes to re-establish themselves as important linkages in a broader regional community. Using new communication technology at local level to integrate their communities can help to change the discourses that presently restrict the identification of locality to a limited spatial context. A significant part of the process though is the need for higher levels of the state to supply the infrastructure to allow its citizens at local level to share in the fruits of a democratic polity.

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Table 1
Numbers of Farms, Sheep, Milk Cows & Beef Cattle in Moyne Shire 1971, 1981, 1997

	1971	1981	1997
Number of Farms	2639	2074	1523
Number of Sheep	3,062,243	2,557,605	1,801,247
Number of Milk Cows	139,689	118,869	154,180
Number of Beef Cattle	196,602	174,256	194,099

Source: Australian Bureau of Statistics, Agricultural Census, 1971, 1981, 1997

Table 2
Numbers of Sheep Farmers, Dairy Farmers and Beef Cattle Farmers in Moyne Shire 1971, 1981, 1997

	1971	1981	1997
Sheep Farmers	656	622	356
Number of Sheep	1889	1551	1234
Number of Milk Cows	121	242	148

Source: Australian Bureau of Statistics, Census, 1971, 1981, 1996

Table 3
Populations of the four major centre in the Moyne Shire 1971, 1981, 1996

	1971	1981	1996
Moyne Shire	18,934	17,409	15,867
Port Fairy	2,427	2,276	2.625
Koroit	1,019	988	998
Mortlake	1,266	1,056	989
Macarthur	363	322	238

Source: Australian Bureau of Statistics, Census, 1971, 1981, 1996

Table 4
Average House Prices in Port Fairy, Koroit, Mortlake and Macarthur, 1987, 1992, 1997

	1987	1992	1997
Port Fairy	$72,120	$107,780	$161,080
Koroit	$56,070	$63,290	$95,780
Mortlake	$31,870	$55,350	$46,730
Macarthur	$61,000	$46,150	$34,150

Source: Land Victoria Valuation Survey & Services, Melbourne

Rural Health: An Alberta Perspective

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The majority of Canadian research on rural health has been from the perspective of providers, rather than the consumers, of the health care system. Most research has focused on education and practice issues, and the recruitment and retention of physicians and nurses. The purpose of this ethnographic study is to understand the health beliefs, values, and practices of rural Albertans from an emic, or insider, perspective. An understanding of these factors would assist nurses and other health care professionals in the development and provision of appropriate and effective health care programs, which are acceptable to rural residents.

Literature Review

Rural has been defined differently according to health care providers, policy makers, and the countries in which they reside. Lee (1991) identified the characteristics of low population density and diversity of geographic environment after examining the American literature for a definition of rural. Leduc (1997) developed a preliminary rurality index of Canadian general practice which was based on the distance from advanced medical services, the number of physicians in an area, the type of hospital, the availability of paramedical support, and the population density. The Canadian Association of Emergency Physicians (CAEP) proposed four definitions of rural that include: (a) rural communities where health care is provided by general practitioners or non-physician providers; (b) rural isolated communities 400 kilometres from a major regional hospital; (c) rural remote communities 80-400 kilometres from a major regional hospital; and (d) rural close communities within 80 kilometres of a major regional hospital (1997, p.12).

Health care practices are strongly affected by what individuals and families believe about health; this includes the practices they engage in to promote health, prevent disease, and treat illnesses and injuries. How health is viewed and valued is the result of multiple factors such as shared family values, modeled behaviours, past personal experiences, and culture. For this study the Health Belief Model (HBM) provided an organizing framework to understand and examine how individuals think about a health event: their susceptibility to it, its perceived seriousness, and the benefits and barriers to taking action (Rosenstock, 1974). Individuals were found to weigh the positive and negative attributes of these factors to determine their course of action (Janz & Becker, 1984). Long (1993) suggested that rural residents view health from the functional perspective of being able to work, in contrast to urban residents who stress the "comfort, cosmetic, and life-prolonging aspects of health" (p. 124). According to Young (1997) Alberta farm women viewed health as being content with themselves and having the personal resources they need to fully participate in their work and other chosen activities (p.110). In addition, a positive mental attitude was seen as a major determinant of health. Seller, Poduska, Propp, and White (1999) found that rural men in the American Midwest defined health as "being able to work and meet responsibilities" (p.326).

There has been little research from the perspective of health beliefs and practices of rural Canadian residents. Therefore, a study was designed to begin to examine what health means within a rural Canadian context.

Current Study

For the purpose of this study rural was defined as communities of less than 1,000 persons and/or regions with a population density of less than 400 persons per square kilometre (Profile of Census Divisions & Subdivisions in Alberta, 1999). In this ethnographic study, semi-structured interviews are being conducted with 25-30 key informants with consideration given to age groups, gender, and a variety of rural sites. To be eligible for participation residents must have lived in a rural area for a minimum of three years. The purposive sample is being drawn from people responding to newspaper advertisement and to letters distributed by contacts the investigators have in the region. Participants are being sought within a radius of 300 kilometres of Calgary. Interviews are being conducted by three of the investigators and a research assistant.
The research questions guiding this study are:
What does health and illness mean to rural Alberta residents?

What health seeking behaviours do rural residents identify as important?

Preliminary Findings

Healthy The participants describe health as being multi-faceted including physical, psychosocial and spiritual dimensions. These components included eating wholesome food and avoiding chemical based foods and growth hormones, exercising, having fresh air, using no medications, and not needing to go to the doctor. One participant spoke of being healthier now because they [the family] were more aware of how things in one's life can change quickly. Others spoke of volunteering which made them a whole person and, of having a place to live where one is centered and free of the hassles of the city.

Unhealthy The participants identified that smoking was an unhealthy behaviour and those who smoked stated that they needed to quit. One person said that living in the city was unhealthy, "not having the freedom and the fresh air". The smog that is visible in the urban centre was highlighted by a participant. Stress and discord within one's personal life added to an unhealthy environment.

Health Seeking Behaviours Some participants provided a general statement that took into account all aspects of their lives "like where you live and how you live". Others highlighted specific activities that included diet, rest, use of vitamins, reading and gaining knowledge, multiple types of physical activity, and doing things together as a family. Asking questions and taking charge, or accepting responsibility for one's own health, were considered to be key components by some participants. One person noted that health seeking was a "common sense thing" incorporating the use of home remedies such as getting lots of rest, lots of fluids, and using chicken soup. This family used herbal medicines to treat minor ailments rather than having medications prescribed for them. There was concern expressed that antibiotics and anti-inflammatories were prescribed too quickly.

Health Care Resources The participants distinguished between traditional and non-traditional resources they used to maintain and improve their health status. It was noted that it was important to trust their doctor and to know they were heard. The need for information was paramount, with some participants noting how they took control and sought resource materials from places like the hospital resource library and the cancer society. Participants valued health professionals who took the time to explain and answer questions, as well as to prepare them to know how to care for a family member who was sick.

There was a valuing of the specialized services available in the urban centre, such as diagnostic services, surgery, and other medical specialists. On the other hand, there was also a valuing of the resources offered by the local facilities and health care providers for emergency treatment, continuity of care, and palliative care. Participants appreciated the time and effort expended by volunteer emergency medical personnel even though they might have limited training.

Conclusion

The findings presented today are only preliminary. The next step is to complete analysis of the remaining interviews and identify recurrent themes. The second phase of this research project will be to expand this study to include other regions of rural and remote Canada. The researchers seek to determine whether there are similarities and/or differences in the health beliefs, values, and practices of the residents of these areas. An understanding of these factors is basic for future studies on the development, implementation, and effectiveness of nursing and health care programs provided to rural residents and the utilization of health care resources.

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The Role Of Elders And Elder Teachings: A Core Aspect Of Child And Youth Care Education In First Nations Communities

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Abstract

First Nations communities have particular needs to maintain cultural values as a central aspect of community values and that elders and the traditions and experience that they hold are both the appropriate sources and the appropriate vehicles for the maintenance and transmission of those values. This thesis is elaborated through reference to programs currently delivered by Malaspina University-College Human Services area, and in particular the Child and Youth Care First Nations diploma programs at Cowichan and Port Hardy. The students who attend are predominantly individuals whose origins are in rural communities; the case is made that First Nations communities in western Canada, regardless of location, share a set of needs and characteristics with rural communities in general. The importance of elder teachings to the education process is examined for cultural relevance, local needs, family and historical links, and practitioner competence.

The issues

The discussion of rural and urban as terms or concepts that apply to First Nations people and communities has proceeded through a variety of viewpoints. Parallel with this ongoing discussion, the understanding of what constitutes urban versus rural, and what is the meaning and significance of the differences between the two, has seen it's own alterations and discipline-specific evolution. Briefly, and without comparing the values attached to the terms, in this presentation we recognize the emergence of a number of conflicting themes that might apply to educational programs specifically tailored to meet the needs of First Nations:

- There is "an oft-cited externally imposed dichotomy between urban and rural, based on the lingering stereotype that "Indian" is synonymous with rural and that urban is somehow not genuinely Indian" (Lobo, 1998, p. 93).
- Urban adaptation is the logical outcome for all, and particularly for "Natives" in adjusting to the demands of modern technological society (discussed in Grantham-Campbell, 1998, p. 386).
- The urban-rural continuum approach does not adequately represent today's world in which "telephones, television and the internet expose every reservation to the problems and perks of urban life"(Strauss & Valentino, 1998, p. 105).
- The intertribal or "pan-Indian" identity assumed by many urban-based Aboriginal people does not imply discontinuity in relation to home areas, tribes or bands (Strauss & Valentino, 1998, p.105).

The critical issue in response to these themes is our contention that many of the educational needs of First Nations communities cannot be met through educational programs that take place far away from the home area. Needs for human services practitioners, in this case in the Child and Youth Care (CYC) discipline, require trained graduates who know and understand all about the people, issues and dynamics of the local area, as well as larger themes concerning worldview and identity. The core component in fulfilling that requirement is access to those people who represent First Nations knowledge and traditions: the elders. Education that provides meaningful contact between students and elders can produce graduates who have the requisite local understanding as well as the generic skills and information relevant to the discipline. In other words, relevant education for First Nations CYC students can only take place where there is access to elders, and in our experience, that means in or close to their home areas.

The attractiveness of education in the home area derives from many factors, two primary ones being 1) a reduced monetary cost for education close to home in relation to being away from home, and 2) a social cost involved in the severing of close ties, both short and long-term (for those who go away to school, there are always some who choose never to return on a full-time basis). Both of these costs are borne in various ways both by the student and by the band or community.

There are arguments to the effect that the First Nations urban phenomenon goes beyond those issues that concern loss of tribal identity and culture (Strauss, & Valentino, 1998; Grantham-Campbell, 1998), nonetheless, these issues are alive and well in the voices and minds of those who continue to live in the home areas. In addition to fears about both the financial costs and the social connectedness of those who leave for educational purposes, there is the psychological residue left from the residential school system. A strong memory remains from the era when First Nations customs and societal practices were attacked and repressed, a memory of children being taken forcibly from their home environments and sent "away" to school where they became estranged from their homes, families and culture. In subsequent generations up to the present day, that experience, collectively and individually, negatively affected the attitudes of many people in First Nations communities, including students and potential students. Education was, and in many cases continues to be seen as an instrument of ongoing colonialism, which imposes a "Eurocentric," "superior," worldview over an Aboriginal, "inferior," one.

Post-secondary education in British Columbia (BC) has tended to be an urban phenomenon, an outgrowth of demographic shifts, economic and population growth, based in regional and provincial centres. However, in recent years there has been a developing trend in First Nations communities to look for ways to create educational opportunities for their members closer to home, and for educational institutions to begin to respond to those needs. On Vancouver Island, Malaspina University-College has delivered Child and Youth Care First Nations two-year diploma programs since 1993. Currently there are two, duplicate, programs, one at Malaspina's Cowichan campus in Duncan, and another in the Port Hardy area. The former was developed from a partnership between Cowichan Tribes, Malaspina, and the University of Victoria's School of Child and Youth Care, which developed the concept for the program (Kuehne & Pence, 1993). The latter was developed through a partnership between Malaspina and the Tri-Bands consisting of the Kwakiutl, the Quatsino, the Gwa'sala-'Nakwaxda'xw Bands.

A central feature of these programs is that students meet with local elders weekly, throughout the two years, in seminars that are credited, university-transferable courses. The themes and topics covered in the elder teachings seminars are subsequently woven into the assignments and evaluation for the other courses in the curriculum (Cooke-Dallin & Underwood, 1998). This is the aspect of the programs that makes them relevant and responsive, each in its locale.

Definitions

What do we mean when we refer to "elders" and what is their role in First Nations
culture? Let us begin with some definitions.
Elders are those persons in a First Nations community who are recognized for their wisdom, knowledge and their life experience, as it relates to the community. They are people who are expected to share their teachings.
Teachings are messages about what is right and wrong: how to act, how to perform, how to understand – within the context of the correct attitude to hold. In First Nations tradition, teachings are practiced and passed along within families; they may vary from family to family, although through marriage and social ties they often become known within an extended family and beyond. In earlier days they were based on real-life examples, descriptions, live modeling, or on the content of stories or legends. In recent times the concept of teachings has come to mean more than family traditions by including suggestions of how to be successful in response to the demands of western culture, especially in regard to how to maintain First Nations culture in an effective coexistence with western culture.

The relationship between elders and the teachings

As teachers, elders carry the responsibility of maintaining the core message of the knowledge they hold. They are not empowered to change the words, sometimes an elder will preface a teaching by saying "these are not my words". Although the teachings are not subject to editorial control, they can certainly be adapted to the particular circumstances at hand, and it is the wisdom of the elder that brings forth appropriate teachings when they are needed.

In the home area and the local community, teachings are transmitted at a number of venues, among these are, 1) in the home informally as an aspect of everyday life; once upon a time this was how children learned most of the knowledge and skills required for daily living, 2) in the home more formally at family gatherings, when for instance, elders will share and discuss teachings during and after a family meal, 3) at a community cultural event or ceremony, such as a naming, a memorial, a traditional wedding or adoption, a funeral or a school event; elders will share teachings as part of the ceremonies in community buildings and churches, 4) at the bighouse as a main feature of traditional bighouse proceedings. Beyond these occurrences, the elders and teachings may be central to treaty and land claims, court proceedings, medical and scientific meetings and conferences concerning any number of themes.

Elders who are role models demonstrate a willingness to be approached and to share, they prepare through practice and through practice they become recognized and trusted. Their behaviour as elders is consistent with the teachings about conduct and attitude (about how to be "right" in the world). They show humility, candour and honest self-disclosure, an unaffected manner, integrity in their dealings, sensitivity to others, politeness, and success in coping with community and personal circumstances. Elders model consistency in their respect for, and adherence to, cultural traditions. A large part of the role involves reinforcing the goals and efforts of younger people, for instance, education is often promoted as a means to succeed as a person as and a community member, within the larger context of life, and "life is an education".

All of the teachings have a long-range focus in a way that western culture does not. They are concerned with the people and the culture as ongoing and permanent phenomena, existing inseparable from, and connected holistically to, all of the seen and unseen world. This viewpoint reflects a legacy of oral history through which events and family members can be recalled and revisited through scores of generations and hundreds of years.

The ongoing impact of oral tradition contains both educational and social dimensions. Its most essential characteristic is that it requires both a speaker (or "presenter") and a listener (or "participant") in order to occur. As described above, the transmission of teachings takes place most often in groups. There the links between the generations are strengthened through a common regard for the teachings, and for the comforting presence of the elders (Stiegelbauer, 1996). The sharing contributes to a number of interactive and interconnected factors:

- Group affiliation is increased through shared experiences. Respect and attention to the speaker are modelled
- Memory and processing skills are practiced. The presence of the elder has a positive impact on the participants
- The elder "reads" and responds to the characteristics of the audience. Thus the continual process of education that is accomplished through sharing the teachings orally relies to a large part on the interpersonal human dimensions involved.

The special regard accorded to elders has a number of sources. One very important reason for this respect is their link to the teachings, which are the basis both for survival and for an understanding of the universe - "the Creator, the connection with nature, the order of things and the values that enhance the identity of the people" (Kirkness, V.J., 1998, p. 11). Although it is not necessary to be an elder in order to understand and discuss teachings, it is *specifically* the role of elders to transmit them. Because the accumulation of teachings is considered to be a life-long undertaking, increased age equates to increased knowledge, hence an elder is a source of many teachings. The practice of relying on elders for these purposes is consistent both with the tradition of oral history which has always existed as a feature of First Nations culture and with contemporary practices in First Nations communities, which endorse the special teaching role of elders (Cooke-Dallin & Underwood, 1998, p. 32). And, in a society that values extended family relationships, elders are the symbol as well as the repository of indigenous culture, that is, cumulatively they are the physical representation of the continuity of accumulated knowledge between generations as well as being individually the carriers and communicators of practical knowledge about what to do and how to do it.

It is the elders who can be relied upon to discuss and decide upon all issues that affect the welfare of the community. Because First Nations cultures integrate social, cultural and political functions, all of these are aspects of the elder role. Within these generally overlapping areas of First Nations community systems, elders are acknowledged as the source of authority (understood through the leadership of elders in collective, family and community, group decisions). This tradition, along with others that stress social informality in the relationships attached to everyday affairs, the priority accorded to culture, flexible notions of time, and an emphasis on the recognition and maintenance of extended family relationships, have often placed First Nations in direct conflict with "western bureaucratic forms of organization with their inherent features of specialization, standardization, compartmentalization and systematicity" (Kawagley & Barnhardt, 1998).

Educational programs

In this regard, western education, emphasizing formal learning structures and discrete areas of specialization, has been slow to recognize the intrinsic value of an oral, cumulative, approach to knowledge. As a result, only recently has the importance of the teachings tradition and the elders been acknowledged in the education delivered by BC's post-secondary institutions, and when it does occur it tends to be delivered only in particular circumstances: predominantly in special programs that target First Nations students. In human services programs, with stated core values of cross-cultural perspectives and cultural competency, there are tensions attached to the concepts of individual orientation versus collective orientation, and the concepts of social and cultural progress versus social and cultural sustainability. In this case sustainability means continuous assertion, it does not imply stasis. "… indigenous people…as a matter of cultural survival , have been quick to adapt new technologies and to grasp the 'new world order.' While retaining a keen sense of place and rootedness in the land they occupy, they have not hesitated to take advantage of new opportunities…This is done, however, within their own framework of values, priorities and worldview, so that the developmental trajectory they choose is not always the same as what outsiders might choose for them (Kawagley & Barnhardt, 1998).

Elder Teachings are culturally relevant and hence meaningful to the identities of First Nations students, practitioners and communities. Valuing traditional knowledge by making it central to the educational program, is valuing the students' life experience. Meaningful education must provide students with learning that fits the context of their lives. Through Elder Teachings, students in the CYC First Nations program are given the opportunity to learn skills and theory and develop as practitioners within the context of their own culture.

At the meeting point between post-secondary human services education and traditional First Nations teachings, there appears to be a coalescence of values around an emphasis on family and community. In this regard there seems to be an opportunity for mainstream western approaches to gain from the First Nations understanding of the interdependence that exists between individuals, the families and communities - through which individuals are nurtured in their growth by their family and community, and the family and community are strengthened through the growth of individuals. This is a topic area of immense richness in the teachings everywhere. And such it is an example of an area in which competence for First Nations CYC practitioners can apply to their interactions within service sectors beyond their First Nations communities. There are opportunities to promote a more wide-ranging and inclusive viewpoint on community health as well as to inform non-First Nations people about how effective services are understood from a local First Nations perspective.

At the same time, because CYC education in BC is coordinated through a provincial articulation process, students in all institutions are taught according to shared learning objectives. Consequently, although students in Port Hardy or Duncan will have particular knowledge about their own communities, they will also have the same or equivalent skills and knowledge as students in other institutions and programs within all of the recognized core areas of CYC. In other words, they will be equally prepared for all aspects of practice that do not require specific local knowledge, in any location in the province. In addition, we hear that students who have the opportunity to experience this form of education develop generic skills that are valuable in First Nations contexts beyond the home site, because the respect shown for elders, the role of elders generally, and the concepts of shared worldview and First Nations identity, apply in other areas within BC, and beyond.

There is a sense of being involved in an important process of maintaining connections through learning from elders. Indeed, we hear from many of the elders that they too are continuing to learn and that they do this by going to their own elders. There is an acknowledgment that learning is a life long process.

A concern heard from many of the elders we see is that "children don't listen to their elders anymore". The break down in the traditional system of learning and connecting worries them. Within our classrooms, we begin to rebuild this way of connecting, first by connecting elders to adult students, and second, by connecting students to situations containing children and youth, where they can re-initiate those contacts between the generations. In Cowichan, at least one prominent elder has suggested that, in view of the erosion of many family-based social and cultural practices, it is now appropriate to consider CYC students - who share the elder's emphasis on family - as an important link to cultural information - passing on the teachings that they gain in the seminars.

The connecting that happens within the classroom is often a result of existing connections that students have with elders and also leads to further connections. Students engage from their prior knowledge and with curiosity. During Elder Teaching classes, students will inquire about teachings they have knowledge about; they want to know more and to have their knowledge confirmed. There is a sharing of knowledge within the session. The expectation of the CYC First Nations program is that students will integrate the learning from the Elder Teachings with the content of their course work and practice. Students tend to go beyond this expectation, adding to their learning from the Elder Teachings classes by talking with their own family elders. There is an enthusiasm to continue exploring in-class learning. An elder in class talking about a particular place, person, event or custom often leads to students going to their family members to ask what they know on the same or similar topics. This type of connecting leads to understanding of self and learning about one's own origins. Following an Elder Teachings class where two elders told spoke about the relocation of their reserve, a student said, "I enjoyed having them in because it helped bring back some of the things I had forgotten about my own childhood. Listening to them made me want to go to others in my community and ask questions so I can learn more of what had happened during the move" (C. Demontier, personal communication, January, 2000).

As well as these family and historical connections, there are other community connections that are enhanced through the inclusion of Elders in the CYC First Nations program. Having elders in the classroom means that the community is in the program and the program is in the community. Community links are built through the relationships that local elders have with program participants. This helps to keep the program in the awareness of the community, while in turn, keeping the students aware of community issues. Elders that work in the classroom are often part of students' personal support systems. While we look to elders because we value their traditional knowledge, these same elders are often the greatest encouragers for students in pursuit of their educational goals.

In including elders within the CYC First Nations program our goal is to bring in traditional knowledge, thus, we sometimes engage other resource people. This means we might include someone that might not yet be considered an elder, but that carries traditional knowledge in a particular area, for example, someone skilled at teaching a local First Nations language or songs. Some might refer to these younger teachers as "elders in training".

The inclusion of elders within an educational program requires a consciousness of and a respect for local customs and protocols. For instance, guest elders in the CYC programs are paid by honoraria in order to acknowledge their learned status as teachers, as well as to recognize them as honoured guests. Lertzman (1996) refers to these payments as "the practice of cultural accountability" (p. 51). He points out that it is always necessary to know how to proceed in a bi-cultural context.

In the traditional First Nations context, there is a strict protocol and procedure for the passing of cultural information. One could regard this as a protocol of respect. The protocol of respect is founded upon: permission, recognition and accountability. How permission is asked and recognition is given may vary from region to region. Yet one will almost always find a procedure in place. In a community where knowledge is transmitted orally, people are held accountable for their actions, their words and the manner in which they conduct themselves according to their protocol (p.48)

A local facilitator plays an important role in ensuring that the Elder Teachings course is conducted appropriately. It would not be fitting for someone from outside of the community, for example, a visiting instructor, to take the lead in coordinating elder's visits to class. One need not have all the answers around protocol, but one must have an awareness about who and what to ask. Students who have strong connections to family and community are also an important source of knowledge around protocol. This attentive way of coordinating the Elder Teachings is a mirror of the lessons we hear from the elders themselves. Many elders have told us about how they too look to others for guidance and permission.

In summary, it is clear that for CYC practitioners in First Nations communities, the importance of education that is tied to the role of elders is served through the following factors:

- the presence of, and access to, the elders
- learning, and incorporating into practice, the teachings provided by elders
- preserving ties to family (in the broad sense);
- day-to-day involvement in, and knowledge of, the community and it's current issues;
- maintaining the link to the homeland and the language;
- access to education that is relevant to current needs

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A Community-Based Business Retention And Expansion Model: A Tool For Economic Development- The Ontario Experience

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Abstract

Rural communities are committed to the creation of strong local economies. This task is often daunting in an era of globalization, community competition and reduced local financial and staff resources. Research indicates that 40% - 90% of new jobs created come from existing businesses. Notwithstanding this fact, many communities focus primarily upon the attraction and recruitment of new businesses. Relevant community economic development tools are needed to support the efforts of communities in their attempts to support existing businesses. In Ontario, Canada, an innovative private-public sector partnership was created to develop a cost effective, community-based business retention and expansion program that could be easily implemented at the community level. The BR+E Initiative was piloted in ten rural communities, has been modified based upon the results of an evaluation and will be made available to other communities for use in their future economic development efforts. The presentation will focus upon private – public sector partnerships, operational details, obstacles and challenges, pilot community experiences, and the future of BR+E as a community economic development tool.

Job creation and economic development are key policy objectives at all levels of government. Every community, no matter its size, is interested in supporting initiatives to improve the local economy. The challenge faced by communities is to identify the most effective strategies and develop the resources to implement these initiatives. Business attraction and recruitment, community promotion, support for small business development, labour skills development, and existing business retention and expansion are but a few of these initiatives.

This paper will make the case for business retention and expansion as an economic development strategy and elaborate upon a proven community-based business retention and expansion visitation model utilizing community volunteers. Steps to implementation will be discussed as well as the impacts and lessons of recent Ontario business retention and expansion (BR+E) projects.

A Case for Existing Business Retention and Expansion

Until the 1980s, economic development professionals (EDPs) focused most of their efforts on the attraction and recruitment of new business. This trend however is changing; increased global competition and consolidations resulting from mergers and acquisitions and the introduction of new technologies have altered the pattern of business development. In view of these and other changes within the economy, EDPs are finding the need to diversify the tools they employ to achieve the goal of economic development.

Recent studies (Morse, 1990, p. 18), and observations from local EDPs reveal that 40% – 90% of new jobs created come from existing businesses. A 1998 study of four U.S. industrial retention and expansion programs identified substantial positive impacts from such initiatives: including businesses and jobs retained, local workers trained and existing businesses assisted in their expansion plans (Mayer, 1998). Eric P. Canada, a marketing and economic development consultant indicated that 70% of all business comes from repeat clients, 15% from referrals, and 15% from new business development (CUED, 1997). Borovolis (University of Waterloo) and Morse (NERCRD) both make a strong case for a greater focus on existing business retention and expansion strategies as a prime means of improving local economies.

Communities across Canada and the U.S. are allocating an increasing proportion of their economic development budget to the support of existing businesses and the implementation of various business retention and expansion programs. The cost-benefit of retention and expansion programs is generally seen to be greater than single focused attraction and recruitment initiatives. In view of this mounting evidence, tools and resources need to be developed to facilitate the implementation of effective retention and expansion programs at the community level.

Business Retention and Expansion Models

The basis of a good business retention and expansion visitation program is communication with business owners, the identification of and immediate response to urgent business issues, gaining insights related to company and industry trends, and supporting business development opportunities. Information gained from surveys can be utilized to respond to potential business closures and the development of short and long term action plans to support business development in the community.

An effective retention and expansion visitation program will retain jobs and tax revenues, foster the growth and retention of existing businesses, enhance a community's reputation as a good place in which to do business, and

complement a community's attraction and recruitment activities.
The concept of conducting business visits, as a means of supporting business development is not new. EDPs have implemented informal "business call programs" for a number of years. These initiatives provide municipal officials with the opportunity to meet owners of major firms and respond to their needs.

A number of communities and jurisdictions have developed a more structured, survey driven retention and expansion visitation program. As examples, the cities of Gloucester and Saskatoon implement the Business Success and Saskatoon Tapping Industrial Programs, respectively. B.C. Hydro and the Ontario BR+E Partnership, developed and are implementing, community-based business retention and expansion visitation programs to support local business. The provinces of New Brunswick, Newfoundland and Saskatchewan are currently exploring the development of similar programs.

In the U. S., Business Retention and Expansion International (BREI) and the National Council for Urban Economic Development (CUED) provide training courses in business retention and expansion. BREI promotes a proven community-based business retention and expansion visitation model utilizing local community volunteers (NECRD, 1997). The CUED training program focuses on economic development professionals and consultants to conduct the business interviews and implement the retention and expansion project.

Ontario's Community-Based Business Retention and Expansion (BR+E) Model

Background

Rural and small town communities are interested in stimulating their economies but often lack the staff and financial resources to effectively achieve this objective. A need was identified to develop a community economic development tool, which could be implemented with limited resources at the community level. This decision lead to the development and piloting of a structured community-based business retention and expansion visitation initiative in a number of rural Ontario communities. The purpose was to design and create an economic development tool that could be utilized by communities of various sizes.

The Ontario Ministry of Agriculture, Food and Rural Affairs provided leadership and facilitated the development of this pilot BR+E initiative in 1997 and 1998. Representatives from pilot rural communities in Ontario (Figure 1) attended a 2 ½ day BR+E training session. The training followed the model as developed by George Morse and Scott Loveridge (NERCRD) in the U.S. Community representatives, ministry and other agency staff, received training in this approach from Business Retention and Expansion International (BREI) Master Consultants, Tom Ilvento of the University of Delaware and Kathy Tweeten of North Dakota State University.

BR+E Partnership

A public – private sector partnership was established to fund and provide direction for the pilot initiative. These partners saw the value of such an economic development tool and were prepared to support the initiative with both staff and financial resources:

- Bell Canada, Ontario Power Generation, Microsoft Canada and Enbridge Consumers Gas
- Industry Canada FedNor, Human Resources Development Canada
- Ontario Ministries of Environment; Training Colleges and Universities; Northern Development and Mines; Agriculture, Food and Rural Affairs
- Economic Developers Council of Ontario, and Ontario Association of Community Development Corporations

Agriculture and Agri-Food Canada also became a funding partner in the initiative through the Canadian Rural Partnership.

The BR+E Model

The Business Retention and Expansion (BR+E) initiative is a community-based economic development tool to encourage growth and stability of local business. BR+E promotes job growth and economic prosperity in rural Ontario by helping communities identify both opportunities for expansion and the barriers to survival facing local businesses.

This approach to business retention and expansion makes extensive use of local volunteers. Volunteers in rural communities are often the key resource to project development and implementation. This valuable community resource is recognized in the implementation of a business retention and expansion visitation project.

The following represent key components of this BR+E model:

- Trained BR+E consultant available to assist the community
- Leadership Team and Task Force composed of community and business representatives
- Volunteers trained to conduct business visitations
- Business service providers
- Structured survey
- Training materials for BR+E implementation
- Immediate follow-up to urgent business issues
- Survey data analysis
- Development and implementation of strategic action plans

BR+E Objectives

Short as well as long term objectives can be achieved by such an initiative. A longer period of time is often required in order for a community to experience specific job or business creation results.

Short Term

- Demonstrate and provide community support for local business
- Improve dialogue between the community and local business
- Solve immediate individual business concerns

Long Term

- Increase business development, job creation and retention
- Increase the competitiveness of local businesses
- Develop and implement strategic economic development action plans
- Creation of a positive business environment
- Increase the capacity for local economic development

The BR+E Model in Practice

Community leaders and volunteers are trained in the implementation of BR+E. The BR+E model incorporates four distinct stages.

1. BR+E Planning and Business Visits
2. Immediate Follow-up
3. Data Analysis & Action Plan Recommendations
4. Public Meeting and Action Plan Implementation.

A community *Leadership Team* introduces BR+E to a community through information sessions and trains local Volunteer Visitors to conduct a confidential survey of local businesses. Using a pre-tested survey, the Volunteer Visitors interview business owners or managers to pinpoint business needs, concerns and development opportunities. Volunteer Visitors are trained specifically to gather information from local firms and pass the surveys on to the *Leadership Team*.

A local *Task Force* composed of local community leaders, representatives of the business community, labour, education, utilities, and EDPs reviews the survey results, and responds to the immediate needs and concerns identified by the local business people. A more extensive analysis of the survey data by the *Task Force*, summarizing the key trends, needs and issues facing the business community, is used to develop a community-based strategic action plan to improve the local business climate and take advantage of development opportunities.

The *Leadership Team* presents the survey findings and action plan to the community at a public meeting. Implementation teams composed of community representatives are established to put the action plan into motion.

A Resource Network of economic and business development professionals and key service providers from both inside and outside the community is brought together to help implement the action plans. This *Network* is key to implementing action plans as well as responding to the urgent business needs.

BR+E Pilot Project Results

Ten pilot communities (Figure 1) were involved in implementing the BR+E project. These initiatives have been completed and the communities are in the process of implementing the identified action plans.

A consulting firm was retained to evaluate the pilot BR+E projects, make recommendations regarding any needed improvements and identify pilot project results. The authors of the report describe the Ontario BR+E model as "leading to a better understanding of local business issues, creating business alliances and co-operation for action, providing a collective response system to improve service, developing innovative solutions, and enhancing community empowerment." (Randolph & Baxter, 1999).

Approximately 700 businesses along with 800 volunteer visitors, Leadership Team and Task Force members participated in the BR+E pilot projects. Information collected was useful in identifying key business needs, issues and development opportunities within the community.

Pilot community representatives indicated that the BR+E initiative was very successful and an important strategy in their overall economic development efforts. The communities experienced a range of positive impacts as a result of the BR+E initiative.

The following represents a sampling of the impacts.

- retention of 200 – 300 jobs in each of two pilot communities i.e. planned business relocations prevented
- existing businesses expanded as a result of assistance
- improvements to local information technology infrastructure
- business information seminars initiated
- labour training needs identified and follow-up training sessions organized
- elimination of barriers to the development approval process
- information requests forwarded to businesses
- pro-business attitude communicated
- economic development action plans developed
- urgent business issues addressed immediately – "red flags"

Critical Factors to the Completion of a Successful BR+E Project

Experience with the pilot projects identified a number of key factors leading to the completion of successful projects.

- Community and organizational readiness for economic development
- Local champions to support the implementation of economic development initiatives
- Immediate follow up to identified urgent issues
- Maintaining the momentum in the community to complete the process and action plan implementation
- Commitment to economic development
- Strong community and business leadership
- Ability to analyze the survey data and develop recommendations
- Ability to undertake community projects in a cooperative manner
- Dedicated volunteer base
- Open-minded attitude
- Paid project coordinator responsible for the project
- Budget for the project
- An ability to coordinate and facilitate the entire process

The Future of BR+E in Ontario

BR+E as a community economic development tool has been refined and is being made available to communities. Consultants have been trained and will be able to utilize the BR+E tool kit and assist communities in their BR+E projects. The BR+E tool kit will include a CD-ROM with the survey, training manual, evaluation framework, and program for data analysis. A promotional and training video as well as brochures will be available for use by communities in their plans to implement BR+E in the community.

Communities have already expressed great interest in BR+E as a means of improving the local economy. With minimal financial in-kind and cash resources ($8000 - $10,000) and a strong and committed volunteer base, communities will be able to implement a BR+E project and thereby support existing businesses and the development of the local economy. It is anticipated that rural as well as urban communities will make use of this tool.

Conclusion

Experience has shown that all communities will be interested in improving the local economy, they may however, not all be ready to implement a BR+E project. The leadership and organizational capacity of the community must be assessed and in place prior to the initiation of such a project. Steps may need to be taken to ensure strong support and leadership from various sectors within the community.

While business attraction and recruitment activities will no doubt continue to play a role in local economic development, initiatives that support existing businesses are being recognized as key to successful local economic development. This community-based business retention and expansion visitation model provides a cost effective, structured and proven template for aiding in the improvement of local economies. Businesses as well as communities will benefit from such an initiative.

BR+E Resources

Organizations such as Business Retention and Expansion International (BREI) support the research and development of effective business retention and expansion strategies. BREI does provide a certified training program in a community-based business retention and expansion for those wishing to gain the skills to help communities implement such an initiative.

The BREI annual conference is being held in Portland, Maine, May 20 – 23, 2000. Additional information regarding the conference as well as the certified training can be obtained by accessing the BREI website - www.brei.org.

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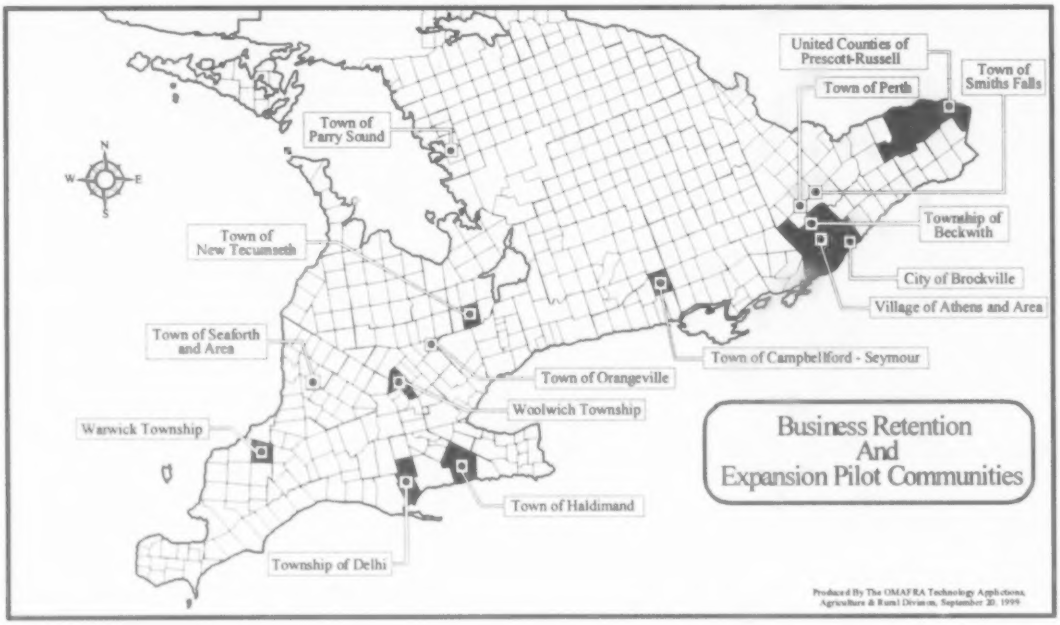
Figure 1. Pilot BR+E Communities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City of Brockville
Village of Athens and Area
Town of Seaforth and Area
Town of Campbellford - Seymour
Town of Orangeville
Woolwich Township
Warwick Township
Business Retention And Expansion Pilot Communities
Town of Haldimand
Township of Delhi
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The Times They Are A Changing: Identifying Local, Provincial, and National Forest Values for Socially Acceptable Forest Management

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Abstract

The growing debate on forest management options often overlooks or conveniently ignores that Canada's forests are largely owned by the Crown, with only 6 per cent being privately held. Crown land is a publicly owned resource, with jurisdiction over forests vested in the provinces as representatives of the people. To determine their values for crown forests and preferences for forest management, a mail survey was conducted of 1. local (Fraser Ft. George Regional District, n=974 [Canada's largest resource dependent community]), 2. provincial (British Columbia, n=1208) and 3. Canadian (n=1672) publics. The survey tapped the forest uses, services and benefits that are most valued by the public, and public preferences for a number of forest management approaches. The survey assessed forest management issues related to forest management priorities, biological diversity, old growth forest, tree harvesting methods, treatment of forest sites, allocation of wood supply, road access, public recreation, partitioning the forest, research on forest management, and public involvement in forest management. This paper reports on the study's key findings. There was general agreement among all publics, with all publics holding multiple values for the forests and preferring an ecosystem based approach to forest management over single-value/timber management. Overall, all publics values their forests more for ecological reasons than for economic wealth and jobs. The local public tended to place significantly different ($p<0.05$) priority on economic and other values. All publics favored community driven and locally owned approaches to management over large corporation dominance. All publics agreed that forest managers should be especially responsive to the values of local affected communities. Responses also reflected a lack of public confidence in government natural resource agencies. Results suggest forest management as it is currently practised in Canada (aka single-value/timber industrial logging) does not reflect the multi-value/ecosystem-based management preference of the general Canadian public.

Key words: social values, public participation, ecosystem management, forest policy

The Growing Debate on Forest Management

Canada, grand in scale and blessed with seemingly endless forests, is a forest nation in many senses. Canada encompasses a huge land mass that includes 10 percent of the world's forests. Approximately half of Canada's geographical area is forested, although of this 417.6 million hectares only 236.7 million hectares are considered productive or commercially suitable for logging purposes. In 1997, the World Resource Institute identified that of all the world's remaining large, intact frontier forests, 25 percent are in Canada's boreal forest region (May, 1999). British Columbia (BC) alone contains more temperate rainforest wilderness than anywhere else in North America. Canada's role as a forest nation has global environmental significance for regulating climate, air and water quality, and providing habitat for animal, plant, and fish populations and endangered species.

Canada is also a forest nation in the traditional forests-as-timber sense. Logging has long played a major role in Canada's economy. Today, Canada is the world's largest exporter of wood and wood products, and produces one third of the world's newsprint. Almost 100 per cent of the US' imported softwood lumber comes from Canada, while 93 percent of US imports of wood pulp comes from Canadian forests. Harvesting the forest and converting it to pulp, paper, chips and lumber employs 369,000 Canadians directly and another 511,000 indirectly (Canadian Forest Service cited in May, 1998, p. 2). Increasingly, our forests also create jobs and wealth through non-timber activities in the forest. Tourism, fishing, hunting, trapping, and other subsistence and gathering activities are dependent on intact and healthy forests and have significant and increasing economic value.

BC is Canada's largest timber harvesting province, with almost half of the timber harvested in Canada coming from BC's forests. The state of BC's coastal temperate rainforests are of national and international concern. Coastal temperate rainforests only ever covered less than 0.5 per cent of the Earth's surface. Less than 50 percent of the world's temperate rainforests remain and these are in small fragments on the west coast of Canada, United States, Chile, Australia, New Zealand and Tasmania. Twenty-five percent of the world's remaining ancient temperate rainforests are in BC, but less than seven percent of BC's ancient temperate rainforests have been protected and to date 57 percent of BC's temperate rainforest has been clearcut. On Vancouver Island, BC, of the original 170 primary and secondary watersheds, only ten remain intact, and only four are protected. The other six are scheduled to be logged and three of these are in Clayoquot Sound (The Scientific Panel for Sustainable Forest Practices in Clayoquot Sound, 1995).

Despite its vast forest resources, Canada the forest nation is experiencing a forest conflict and facing, some argue, a forest crisis. Consider a 1990 BC Ministry of Forests report which depicts the government's liquidation policy for old growth forests:

Within the over-all policy of achieving sustained yield, it appears the province's implicit old growth forest policy is to liquidate it in favour of young forest plantations. The lack of an explicit recognition of the non-timber values within old growth forests is resulting in conflicts over specific old growth stands. These conflicts will become increasingly bitter as old growth disappears (cited in May 1998).

In BC, the forest tenure system has not evolved and adapted as the socially defined objective of forest management has changed from sustained yield to ecosystem management (Weetman, 1999). Rather, a sustained yield-liquidation policy and a tenure system that cedes long-term control of the resources to mainly multinational corporations have ignited acrimonious debate and deep-seated public concern over the future of the province's forests. This noisy battleground is increasingly replicated in Canada's other major timber producing provinces, Alberta, Ontario, and Quebec, where similar dominant industrial forest management regimes exist. Within this debate, established groups frequently express their ideological opinions in loud and powerful language, and their polarised views are already well known: industrialists and neo-conservative politicians advocating intensified resource development and market-driven economics, and environmentalists and deep ecologists advocating preservation, ecological integrity and spiritual values.

The growing debate on forest management options often overlooks or conveniently ignores that Canada's forests are largely owned by the Crown, with only 6 percent being privately held. Crown land is a publicly owned resource, with jurisdiction over forests vested in the provinces as representatives of the people. In BC, for example, forests cover 61 million hectares of the province's 93 million hectare land base, and 95 percent of the forested land is publicly owned (Natural Resources Canada, 1997). Canada's other major timber harvesting provinces contain similar percentages of publicly owned forest lands. In Alberta, the forested land base covers 38 million hectares, and 96 percent of forested land is publicly owned. The forests of Ontario cover 58 million hectares out of the province's 89 million hectare land base, and 88 per cent of the forested land is publicly owned. In Quebec, forests cover 84 million hectares out of the province's 154 million hectare land base, and 88 percent of the forested land is publicly owned (Natural Resources Canada, 1997). As such, Canadians can theoretically exert a proprietary interest over the management of their forests.

Canadian public opinion on how Canada's forests should be utilised and managed has changed dramatically over the past twenty years, and the Canadian public is attentive to the changes being wrought by resource management agencies across their nation. Nation-wide public attention to environmental services and ecological well-being has occurred (Blake, Guppy, & Urmetzer 1997; Carrow 1997, 1999), and traditional approaches and institutions have proven to be hampered by an inability to cope with multiple and conflicting value judgements, a reliance on aggregative measures that do not capture the full range of less tangible environmental values, a narrow spatial and temporal focus, and a failure to acknowledge the gaps in current understanding of ecological processes (Cardinall & Day, 1998). A sceptical Canadian public have come to view traditional management agencies as being unresponsive to their changing values (Robinson, Robson & Hawley, 1997). In accord with the populist belief that people should have opportunities to influence issues and decisions that impact them and future generations, citizens, stakeholders, and communities across Canada are seeking to democratise forest policy processes through increased citizen decision-making power and devolution of management control to community levels.

Social Values and Forest Management

Sustainable forest management is a view in which people are an integral part of the system (Carrow, 1994; Galindo-Leal & Bunnell, 1995; Kimmons, 1995; Koch & Kennedy, 1991). People are part of forest ecosystems; they derive material and non-material goods and services from them, they live, work, and play in forests, and their values, behaviour, and knowledge of the forest ecosystems affect them in both direct and indirect ways (Forest Ecosystem Management Assessment Team [FEMAT], 1993). Unfortunately, conventional thinking in forestry has relied on traditional economics in studying social questions. The fallacy - that the economy represents the society - is analogous to the fallacy that timber represents the forest (Hopwood, 1993).

Social values of forests are diverse and include economic values. They contribute to well-being, jobs, perceived quality of life, and the satisfaction of society's material needs. Social values are realised by individuals, groups, organizations, communities and populations, are produced through a function of ecological and/or human structure and processes, and occur at a wide range of geographic scales, including local, regional, national and international (Stankey & Clark, 1991).

Some social values are more easily identified and measured than others and there is disagreement about their relative value. For social values that are traded in the marketplace, there is little dispute. However, the lack of markets for other social values (e.g., ecological and spiritual values, social acceptability of forest decisions) makes it difficult to determine how these values are distributed across society, how they change in relative importance over time, how to measure their relative worth vis a vis economic values and how they are affected by policy changes and whether such changes are socially optimal (Stankey & Clark, 1991).

The difficulty of identifying and measuring many non-market social values has contributed to their low political profile. Many of these values have been unaccounted for in forest management (Stankey & Clark, 1991). The irony is that many of these are the values that have become increasingly important in society (FEMAT, 1993).

Forest management is a process of integrating the products of science and technology with social values (Hammond & Adelman, 1976). Forest management conflicts are in part the result of forest management's past focus on the technical aspects of forest manipulation. Despite the impacts forest decisions have on people, human or social issues have received little attention, at least in any explicit and systematic fashion. However, forest management agencies and corporations are beginning to realize that while a forest practice may be based on sound science and economics, the practice will simply not continue in the long run if society judges it to be unacceptable (FEMAT, 1993). Recent decisions to replace clearcutting with variable retention silvicultural practices are examples of this (i.e., MacMillan Bloedel Ltd. and TimberWest Forest Corporation in British Columbia).

Socially acceptable forest management should serve the outspoken, unspoken, and unborn citizen. The outspoken have generally been well represented through consultation processes. The unborn may best be represented by forest agencies' adherence to "sustainable forest management." The unspoken may best be represented through assessment of their opinions (Dennis, 1988; Hale, 1993; Shindler, List & Steel, 1992). Social science survey research methods can be used to understand people's non-market social values and systematically measure their relative importance (Peterson & Randall, 1984). The lack of research on non-market social values means there has been no effective mechanism to capture and provide information about the "highest valued" or "best" non-market use(s) of the forest resource within forest management agencies. Public participation processes may not always be effective at producing information that leads to the development of socially acceptable forest management practices because consultation processes are easily accessed and influenced by specific, organised interest groups, who do not always adequately represent the public (Force & Williams, 1989).

Survey research has a distinct advantage over other public involvement approaches in that it can address public acceptability from the local to the international level (FEMAT, 1993). While surveys cannot supplant more direct forms of public participation, survey research can greatly expand the spectrum of involvement by identifying issue relevant publics (Dennis, 1988). This paper documents the results of a social scientific study of Canadian (national), British Columbian (BC) (provincial), and Fraser-Fort George Regional District (local) publics on the use and importance of forests and forest management preferences (Robinson, Robson & Hawley, 1997) conducted for the McGregor Model Forest Association (MMFA).

Methodology

The survey instrument was designed to determine what values the public attaches to forests and what issues regarding forest management are important to the public. It consisted of sixty-two questions that addressed the use and importance of forests, forest management preferences, familiarity with forestry issues and respondent socio-demographics. The questions were derived from information obtained from interviews with loggers, trappers, guide outfitters, recreationists, input from local residents, Northwood Pulp and Timber Limited reports, Land and Resource Management Plan meetings and relevant literature and research results compiled in Robson, Robinson and Hawley (1996). The survey instrument underwent four independent reviews and a pilot. testing to ensure the surveys validity and reliability.

The survey design and mail-out procedure followed the standardized method of Salant and Dillman (1994). A cover letter with a 1-800 number for information, survey, self-addressed, pre-paid postage return envelope and description of the McGregor Model Forest were mailed to: (a) 974 households in the Fraser-Fort George Regional District (local sample), (b) 1208 households in British Columbia (provincial sample), and (c) 1672 households across Canada (national sample). Within each group, households were randomly selected by computer from telephone directories. The survey population for the study was people aged eighteen years or older who lived in households with a listed telephone number. Stratified sampling was used to divide the survey population into three non-overlapping and independent strata: local, provincial and national. A multi-stage sampling procedure was used to independently sample each stratum.

Surveys were prepared in both official languages. French surveys, translated by the Canadian Forest Service, were mailed to Quebec households whose first language was French (as identified by census data). Canadians who received a survey in the wrong language; were asked to call the 1-800 number to receive the correct survey version. The initial survey was followed by a postcard reminder one week later. Four-and-one-half weeks after the postcard mailing, non-respondents received a follow-up letter with a replacement survey. Finally, a last reminder letter was sent to non-respondents five weeks after the follow-up letter.

All survey returns were coded for data entry to ensure anonymity and confidentiality. The data were scored and analysed using SPSSpc. Descriptive analyses were conducted on the data, and analysis of variance (ANOVA) and Student-Neuman-Keuls tests were conducted to determine whether differences between national, provincial and local responses to various forest management statements were statistically significant ($p<0.05$).

Results

The final response rate was 45.2% (44.7%, 46.7%, 44.1%, respectively for national, provincial and local respondents). Reference to a standard statistical table on sampling error suggests there is a 95% level of confidence that the results represent the survey population (Salant & Dillman, 1994).

The majority of national, provincial and local respondents believed the questionnaire did not exhibit bias (85.6%, 82.1%, 82.5%, respectively). Respondents tended to be male (70.9%, 66.2% and 71.1%, respectively) compared to 48.5%, 48.8% and 50.9% for corresponding census data (Statistics Canada, 1996), and older (e.g. 65.3%, 63.1% and 56.1% for respondents 40 years and over, respectively) compared to 55.3%, 56.1% and 48.4% for corresponding census data (Statistics Canada, 1996). Survey results were subsequently weighted to coincide with census data and precisely reflect the relative proportion of gender and age subgroups within each strata to improve the generalisability of survey results (Salant & Dillman, 1994). Data weights were rescaled so that the average weight minimized the unequal probabilities of selection (Statistics Canada, 1994). Weighting was based on the assumption that respondents represent the characteristics of non-respondents.

Interest Groups to Which Forest Managers Should be Most Responsive

The three respondent groups displayed similar patterns with respect to which interest groups forest managers should be most responsive (Table 1). All three respondent groups ranked local affected communities as the group to which forest managers should be most responsive. All three respondent groups ranked national public opinion and international public opinion eighth, and last, respectively, out of nine possibilities. Overall, the three respondent groups tended to give the most emphasis to local affected groups followed by provincial groups, national public opinion and lastly by international public opinion. Local and provincial respondents placed a higher priority on local affected industry (ranked second and third, respectively, compared with sixth for national respondents). Notable is the ranking of governmental resource agencies (the bodies traditionally empowered to make forest management decisions), which received low to middle rankings (seventh for national and provincial respondents and fifth for local respondents).

Importance of Uses of Canada's Forests

National and provincial respondents ranked the importance of six forest uses in identical manners (Table 2). Protection of Canadas water, air and soil was ranked as the most important use by national and provincial respondents, followed by maintaining the global ecosystem, wilderness preservation, place for a variety of animal and plant life, source of economic wealth and jobs and place for recreation and relaxation. Local respondents ranked economic wealth and jobs higher (third) than did provincial and national publics, both of whom ranked economic wealth and jobs fifth.

Forest Management Priorities

All three respondent groups (87.6%, 87.1%, 88.5%, respectively, for national, provincial and local samples) disagreed or strongly disagreed that forests should be managed only to produce and harvest timber, and agreed or strongly agreed (92.5%, 91.3%, 96.4%, respectively, for the national, provincial and local samples) that forests should be managed for a wide range of benefits and uses rather than for timber production alone (Table 3). All three groups (77.7%, 71.5%, 66.5%, respectively, for national, provincial and local samples) disagreed or strongly disagreed that maintaining the economy of logging communities is more important than preserving the forest for other uses and values. The local respondent group agreed with the latter statement to a significantly greater extent ($p<0.05$) than national and provincial groups.

The item "the present rate of harvesting is too great to sustain the forest for other values and uses" generated a notably larger number of "don't know" responses (range 14.0% to 26.0%) than did the other statements relating to forest management priorities. While all three groups (54.0%, 54.0%, 47.8%, respectively, for national, provincial and local samples) agreed or strongly agreed with this statement, the local group agreed with the statement to a lesser extent than the provincial and national groups ($p<0.05$). National, provincial and local respondents (63.6%, 64.7%, 65.2%, respectively) agreed or strongly agreed that forest management should try to minimize impacts on traditional rural ways of life, such as hunting and fishing for food.

Tree Harvesting Methods

National, provincial and local respondents were generally negative about clearcutting and positive about partial cutting (Table 4). National, provincial and local respondents agreed that clearcutting has negative visual effects, leads to overcutting, has negative environmental effects and is not as good as partial cutting for maintaining other forest uses and values. Local respondents viewed clearcutting more favourably and partial cutting less favourably in comparison to provincial and national respondents ($p<0.05$).

A higher percentage of national, provincial and local respondents agreed or strongly agreed that clearcutting maximizes logging efficiency (48.0%, 46.4%, 63.3%, respectively) than disagreed or strongly disagreed with the statement (20.5%, 22.7%, 16.5%, respectively), although this item generated a large number (12.2% to 19.8%) of "don't know" responses (Table 4). Local respondents agreed with the statement to a significantly greater extent ($p<0.05$) than national and provincial respondents.

All three groups disagreed that tree harvesting methods should ignore impacts on other values to maximize economic returns (84.6%, 85.0%, 85.3%, respectively, for national, provincial and local samples). A larger proportion of national, provincial and local groups disagreed or strongly disagreed that clearcutting mimics natural forest fires (38.9%, 41.7%, 45.4%, respectively) than agreed or strongly agreed with the statement (27.4%, 28.9%, 29.6%, respectively), but this item had a large number of "don't know" responses (range 11.7 to 23.2%).

Discussion

Respondent self-selection is considered one of the weaknesses of mail surveys (Salant & Dillman, 1994) and tends to encourage responses from more interested and possibly more knowledgeable respondents. The over-representation of older people and males among respondents in the present study is attributable to self-selection by addressees who may tend to be homeowners, and therefore older; and to a greater involvement, and therefore interest, of males in forest management. Armstrong and Armstrong (1994) reported that females comprise only 14.9 percent of forestry workers in Canada and are often only employed in support functions. Nevertheless, respondents reported a low level of survey bias. This is attributed to the numerous reviews, pilot testing and subsequent revisions that were made to the survey instrument prior to mailing.

All respondent groups believed that primary consideration should be given to the values of local communities and other local affected groups, with careful consideration being given to provincial and national values and management preferences when setting forest management goals. Fraser-Ft. George and British Columbia residents assigned a higher priority to local affected industry and lower priority to environmental groups than did Canadian residents, possibly because of the greater role of forestry in the lives of Fraser-Ft. George's and British Columbia's compared to Canadians as a whole.

The priority assigned to First Nations declined from the national through the provincial to the local level. This is probably due to British Columbian and Fraser-Ft. George perceptions that devolution of power from the federal government to First Nations will negatively impact the British Columbia timber industry and the Fraser-Ft. George economy. Results were likely influenced by the contentious land claims negotiations between federal and provincial governments and First Nations that were underway during the survey period.

The low to middle rankings assigned by all respondent groups to governmental natural resource agencies agrees with other studies that also revealed the low regard in which these agencies are held by Canadians (Canadian Council of Ministers of the Environment, 1991; Council of Forest Industries, 1994). This supports Carrow's (1994) contention that management of Canada's Crown forests has not reflected the values of the public. It is interesting to note however, that the credibility of natural resource agencies appears to increase as one moves from the national and provincial to the local level, and closer to the scale at which timber harvesting takes place. Local respondents may have believed that natural resource agencies are more responsive to timber values, which tend to be valued more by local rather than provincial and national residents.

Given the high dependency of the Fraser-Ft. George economy on timber, it is not surprising that local respondents placed a higher priority on economic wealth and jobs than national and provincial respondents when asked to rank important forest uses. However, all respondent groups believed the most important uses of Canada's forests should be for the protection of Canada's air, water and soil and for maintaining the global ecosystem. National respondent rankings replicated Canadian responses to the same question in a 1991 survey conducted by Forestry Canada (Forestry Canada, 1992) indicating that Canadians have stable and enduring opinions on important forest uses. This provides an example of how forest values can be tracked to provide resource managers and policy makers with continuing feedback and improved insight on social trends which can assist in the identification of social indicators that might foreshadow shifts in public values (Stankey and Clark, 1991). Findings from this study as well as Forestry Canada (1992) and Energy, Mines and Petroleum Resources Canada (1993) studies, indicate that, in general, Canadians value their forests for ecological over economic reasons.

Responses to forest management statements indicated that all three publics -- Canadian, British Columbian and Fraser-Ft. George residents -- supported a multi-value/ecosystem-based management over a single-value/timber management approach to forest management.

These findings parallel those of a similar study of Oregon and U.S. residents (Shindler, List and Steel, 1992). The lower level of disagreement by local respondents compared to provincial and national respondents, that logging economies were more important than forest preservation, was probably due to greater dependence of the Fraser-Ft. George economy on timber. British Columbia residents may have been less adamant on this point than Canadian residents for the same reason.

Fraser-Ft. George residents may not have believed as much as Canadian and British Columbian residents that the rate of logging was too great to sustain the forest for other uses and values because Fraser-Ft. George residents were more accustomed to the level of logging. The lower rate of Don't Know responses for the local public suggests Fraser-Ft. George residents are more confident about their views, possibly because they have more direct contact with logging activities than Canadians and British Columbians in general. Nevertheless, the relatively high rate of Don't Know responses overall suggests many respondents in all three groups were unsure whether the rate of logging was too great.

Responses to tree harvesting statements verify that Canadian, British Columbian and Fraser-Ft. George residents preferred a multi-value/ecosystem-based management approach to a single-value/timber management approach to forest management. The generally negative view of clearcutting is also consistent with Forestry Canada's (1990, 1992) studies and reveals Canadians' stable and enduring disagreement with the practice. Presumably, Fraser-Ft. George residents were more supportive of clearcutting and less supportive of selective cutting than Canadian and British Columbian residents due to their more direct dependence on the more economically efficient clearcutting method. Fraser-Ft. George residents' higher level of agreement that clearcutting maximizes logging efficiency and lower rate of Don't Know responses reinforces this argument. It is noteworthy that Canadian, British Columbian and Fraser-Ft. George residents tended not to believe clearcutting mimicked natural forest fires, although there was a relatively high rate of Don't Know responses. This is one of the major arguments used to defend clearcutting (Smith, Larson, Kelty, & Ashton, 1997).

Overall, Canadian, British Columbian and Fraser-Ft. George Regional District residents held quite parallel views on forest management. All groups supported a multi-value/ecosystem management over a single-value/timber management approach to forest management, do not support maximisation of economic returns from timber regardless of the impacts and agree forest managers should be more responsive to local resident values than the values of more distant groups. This similarity in beliefs mirrors previous Forestry Canada (1990, 1992) and EMPR Canada (1993) studies and demonstrates that urban and rural Canadians have held generally similar forest management beliefs for a period of at least seven years. Forestry Canada (1992) further concluded the forest management beliefs of urban and rural residents had become even more similar since its 1989 study. This similarity in urban and rural resident beliefs is supported by Dasgupta's (1988) analysis of rural social change in Canada where rural residents are posited to have adopted many of the values of urban Canada due to technological developments (e.g., telecommunication networks, automobiles etc.) and their consequent increased interaction with urban people.

These conclusions contradict the widely held view that urban and rural residents are deeply divided over forest management policy (Hoberg, 1996). As to why this perception continues to exist despite extensive social scientific evidence to the contrary is difficult to judge. The answer may lie in the political processes used by forest management agencies to solicit public input.

Round table processes such as BC's Commission on Resources and the Environment (CORE) and Ontario's Lands for Life while broadly soliciting input, often receive it from narrow, unrepresentative and often polarized special interest groups. These groups frequently express their opinions in loud and powerful language and so their polarized views become well known. Like Dennis' (1988) example of the Plumas County LRMP, powerful and well-resourced industrial groups, often come to dominate local roundtables in forest-dependent communities and, as a result, come to represent the views of local residents. The dissenting views of outspoken, urban-based environmental groups, may likewise come to represent the views of urban residents. As both groups vie for media attention, the complexity of the issue is reduced to short sound bites that represent the conflict in stereotypical terms. Residents of forest-dependent communities are cast as exclusively pro-timber and anti-environment, while urban residents are cast as exclusively pro-environment and anti-timber. As a result, the broader views of forest-dependent community and urban residents are overlooked.

This study together with Forestry Canada (1990, 1992) and EMPR Canada (1993) studies reveal the emergence of stable and enduring beliefs among Canadians regarding forest management. Over a seven year period from 1989 to 1996, Canadians remained opposed to the practice of clearcutting and from 1991 to 1996 continued to value forests for ecological before economic reasons. Since little evidence exists that ecosystem values have eclipsed the importance of economic values in forest policy in Canada and clearcutting is still the dominant harvesting practice (Canadian Forest Service, 1997), the generally low-medium credibility of natural resource agencies among Canadians is not surprising. This lack of responsiveness reinforces Hessing and Howlett's (1997) assertion that resource and environmental policy-making in Canada tend to consider only policy instruments within existing frameworks rather than the possible goals of policy such as sustainable forest management.

Conclusion and Broader Discussion

The future success of forest policy makers and managers will be determined by how well they are able to translate increasingly important non market values into management plans and policies that accommodate a broad and diverse set of forest values. Traditionally, forest officials have identified people's social values in economic terms and through public participation processes that best elucidate the values of outspoken and well-resourced interest groups. The non market social values of the broader public have thus been overlooked.

This research demonstrates how social science research can be used to identify and measure the public's "highest valued" or "best" non-market use(s) of the forest resource. It provides information on how non market social values are distributed across society (e.g., rural to urban areas), how they have changed in relative importance over time (e.g., from 1989 to 1996), how they rank relative to economic values (e.g., relative importance of non-timber values vis a vis maintenance of the economy of logging communities) and how they may be affected by future policy changes and whether such changes will be socially optimal (e.g., introduction of policies that promote ecosystem management and reduction of clearcutting). This information can be tracked to provide forest policy makers and managers with information on social trends that can assist in the identification of social indicators that might foreshadow shifts in public values. It can provide forest officials with a more complete understanding of their constituency, balance values expressed through markets and public participation processes, and facilitate the development of more socially sustainable forest management policies.

Social valuations of Canada's public forests in the 1990s demonstrate that Canadians' desire increased and higher forms of public participation, have limited faith in bureaucratic resource agencies, support community-driven forest management over corporate domination, and desire management that emphasises ecological integrity and diverse uses of the forest over traditional dominant single use timber regimes. As Canadian society's values have shifted toward the maintenance or restoration of ecological well-being and the provision of a broad array of environmental services, unresponsive forest management agencies have increasingly found themselves in conflict with a cynical and frustrated public. In BC, Canada's largest logging province, the past decade has witnessed large scale demonstrations and civil disobedience involving cross-sections of the Canadian citizenry in Carmannah Valley, Walbran Valley, Slocan Valley, the Great Bear Rainforest, and most prominently, Clayoquot Sound. In Clayoquot Sound, during the summer of 1993, over 840 people were arrested (more than in any other act of civil disobedience in Canadian history) for standing in the way of logging crews.

Insufficient management attention to non-commodity values has also generated alternative social means of communicating forest values by increasingly influential and aggressive elements of society. For example, the influence of national (e.g., Greenpeace Canada) and regional (e.g., the Sierra Club of BC) environmental coalitions in the international business arena has grown dramatically, with the number of international businesses boycotting Canadian forest products steadily increasing throughout the 1990s. Consider also the changing nature of education and training for resource managers at Canadian institutions (such as the University of Northern BC where an interdisciplinary resource management program integrates forestry, fisheries, recreation/tourism and wildlife), and the creation of an Eco-Research Chair in Environmental Law and Policy, at the University of Victoria, which seeks among its objectives to identify alternative forest policy options for BC. The past decade has also witnessed significant attempts to increase public participation in forest policy processes across Canada (see Duinker, 1998) (although most have been directive or consultative processes dominated by industry and political elites). Signs of an emerging democratisation of forest management and planning also begin to appear in the form of experiments in negotiation-based participatory processes, a shift in emphasis from 'resistance to' to 'how to implement' ecosystem-based management regimes reflective of Canadian forest values, and recent initiatives in BC to identify and publicise policy alternatives. In sum, these radical changes suggest that Canada is moving away from the post-Second World War 'politics of exploitation,' where the state provides the infrastructure for resource extraction and shares the proceeds with forest companies, towards a new 'politics of exploitation' dominated by concern over the impact of the resource economy on the environment and communities (Wilson, 1998).

Within this new politic, the most radical challenge facing provincial forest management agencies is structural reform required to permit the broad based implementation of community-based ecosystem management regimes. At their highest level, these collaborative processes require a move from a centralised (corporate and bureaucratic), hierarchical and rule-based framework of existing management structures to a decentralised and community-based adaptive management structure (M'Gonigle, 1997b). To implement major structural and legislative change of this type, provincial governments require broad public support garnered by opening up the issues to broad public discourse. Evidence of this dynamic is lacking. While environmentalists and allied critics provide enclaves of lively discourse, forest policy debate in Canada's major logging provinces (BC, Alberta, Ontario and Quebec), is generally barren. In terms of public scrutiny, critical assumptions go unexamined, significant policy alternatives unexposed, and crucial 'who wins - who loses' questions undebated (Wilson, 1998). Rather, the issues and extent of forest policy debate across Canada continue to be controlled by political and forest industry elites with little interest in raising or responding to questions about the consequences of continuing along the status quo path of sustained yield-liquidation policies and corporate tenure systems. Provincial governments, that serve as the public owner's agent, continue to be pressured by corporate industry who most directly benefit from exploitation of the forest resource, and participatory democracy falls short of its potential (Wilson, 1998).

According to Wilson (1998, p. 38), "While democratic well-being is a multidimensional concept, a central component does hinge on the notion that in vibrant political societies, important policy decisions and nondecisions are preceded by lively debate about the costs, risks, and benefits of a full range of options." This is the challenge currently facing provincial governments and forest management agencies across Canada. Given current Canadian forest values, it is sorely time to advance and broaden public debate on the direction of forest policy across the provinces. The democratisation of forest management in Canada requires the political power brokers to organise broad public discourse on key forest policy issues that informs and engages the current generation and seeks to protect the interests and options of future generations. Wilson (1998) identifies key policy questions, such as: How and how much do the public owners of the forest resource subsidise the forest industry? How is the wealth generated from our forests distributed? What is the economic viability of a forest industry that is required to observe high environmental standards? Would alternative policies - such as those advanced in devolution and tenure reform proposals - provide a more optimal package of environmental and economic benefits? If the final stages of the liquidation-conversion policy are completed, will a viable second growth forest industry be tenable in the twenty-first century? Answers to these questions will portray this generation's commitment to future generations. Without rigorous public scrutiny of the assumptions that have directed post-Second World War forest policies across Canada:...people of the twenty-first century are likely to deliver a negative verdict when they discover that one of the wealthiest societies of the late twentieth century aggressively pushed policies threatening forest ecosystems, all in the face of compelling doubts about long-term consequences. They are likely to be particularly scathing in their judgement of the fact that this society refused to stop long enough to debate its obligations to future generations (Wilson 1998)

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Table 1: Ranking of interest groups to which forest managers should be most responsive.

Preamble [1] Who should forest managers be most responsive to when setting forest management goals?

Interest Group	Sample Group					
	National		Provincial		Local	
	Rank	Mean	Rank	Mean	Rank	Mean
1. Local affected communities	1	2.7	1	2.37	1	1.9
2. Local affected First Nations groups	3	4.37	5	4.69	6	5.11
3. Local affected industry	6	4.98	3	4.42	2	3.63
4. Local environmental interest groups	2	3.95	4	4.47	4	4.66
5. Provincial or national environmental interest groups	4	4.73	6	4.92	7	5.68
6. Provincial public opinion	5	4.77	2	4.36	3	4.5
7. National public opinion	8	6.16	8	6.23	8	6.29
8. Governmental natural resource agencies	7	5.35	7	5.18	5	5.07
9. International public opinion	9	7.95	9	7.88	9	8

[1] The preamble preceded the question in the survey.

Table 2: Mean ranking of six forest uses.

Preamble [1] Please rank the importance of the following uses of Canada□s forests in accordance with your own preferences.

Interest Group	Sample Group					
	National		Provincial		Local	
	Rank	Mean	Rank	Mean	Rank	Mean
1. Use for wilderness protection.	3	2.81	3	3.45	4	4.01
2. Use as a source of economic wealth and jobs.	5	4.63	5	4	3	3.96
3. Use for maintaining the global ecosystem.	2	2.77	2	2.82	2	3.63
4. Use as a place for recreation and relaxation.	6	4.67	6	4.72	6	5.06
5. Use for protection of Canada's air, water and soil.	1	2.75	1	2.44	1	3.5
6. Use as a place for a variety of animal and plant life.	4	3.34	4	3.51	5	4.02

[1] The preamble preceded the question in the survey.

Table 3: Percent of agreement with various forest management priorities.

Preamble [1] The harvesting of trees is the major economic activity in many of Canada's public forests. Many other uses have been identified. These include commercial uses such as trapping, fiddlehead fern picking, and guiding as well as non-commercial uses such as sport fishing, berry picking, nature interpretation, snowmobiling, hiking, and photography. All these forest uses compete with or complement each other to varying degrees (e.g. the harvesting of trees may influence recreation opportunities and wildlife populations).

Statement	Respondents	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Don't Know
1. Forests should be managed only to produce and harvest timber.	National	1.1	4.4	5.7	38.4	49.2	1.2
	Provincial	1.8	3.5	6.8	42.0	45.1	0.8
	Local	1.5	4.1	5.5	45.5	43.0	0.4
2. Forests should be managed for a wide range of benefits and users rather than for timber production alone.	National	49.1	43.4	4.2	1.5	0.6	1.2
	Provincial	46.8	44.5	4.6	2.4	0.6	1.1
	Local	51.4	45.0	2.7	1.0	0.0	0.0
3. Maintaining the economy of logging communities is more important than preserving the forest for other uses and values.	National [a]	1.8	6.3	13.0	45.8	31.9	1.3
	Provincial [a]	2.1	7.5	17.2	42.8	28.7	1.8
	Local [b]	1.6	13.0	18.9	46.1	20.4	0.0
4. The present rate of harvesting trees is too great to sustain the forest for other values and uses.	National [a]	22.1	31.9	9.0	7.9	3.2	26.0
	Provincial	21.0	33.0	8.7	11.7	3.0	22.7
	Local [b]	17.1	30.7	12.0	19.6	6.5	14.0
5. Forest management should try to minimize impacts on traditional rural ways of life (e.g. hunting and fishing for food).	National	19.1	44.5	15.8	12.1	3.9	4.6
	Provincial	15.1	49.6	17.7	9.1	3.3	5.2
	Local	19.5	45.7	16.5	13.5	2.0	2.9

[1] The preamble preceded the statements in the survey.

[abc] Respondent groups with different letters have means that are significantly different. * $p < 0.05$

Table 4: Percent of agreement with statements relating to tree harvesting methods.

Preamble [1] Tree harvesting methods depend upon the physical environment and the biological makeup of the area. Harvesting methods range from clearcutting to partial cutting. Clearcutting is the removal of all trees within a cutting area and is the dominant logging practice. Partial cutting is the removal of certain trees selected on the basis of age, species, or health.

Statement	Respondents	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Don't Know
1. Tree harvesting methods should maximize economic returns regardless of their impact on other forest values and uses.	National	3.9	4.6	3.8	34.5	50.1	3.0
	Provincial	2.9	3.0	4.7	36.0	49.0	4.5
	Local	3.1	5.4	4.4	41.5	43.8	1.9
2. Clearcutting has negative visual effects.	National [a]	48.2	35.5	3.4	5.8	3.2	3.9
	Provincial [a]	51.9	32.7	3.9	4.7	3.6	3.2
	Local [b]	36.2	44.9	6.9	8.4	3.0	0.6
3. Clearcutting maximizes logging efficiency.	National [a]	16.7	31.3	11.8	12.8	7.7	19.8
	Provincial [a]	13.0	33.4	11.0	15.5	7.2	19.8
	Local [b]	16.6	46.7	8.0	10.9	5.6	12.2
4. Clearcutting leads to overcutting.	National [a]	37.5	39.5	6.3	6.5	0.8	9.5
	Provincial [a]	34.9	37.5	7.4	5.7	2.7	11.8
	Local [b]	20.6	36.0	10.7	20.1	5.3	7.3
5. Clearcutting mimics natural forest fires.	National	7.7	19.7	10.5	23.3	15.6	23.2
	Provincial	6.6	15.7	12.5	25.4	16.3	23.5
	Local	4.3	25.3	13.5	32.0	13.4	11.7
6. Clearcutting has negative environmental effects.	National [a]	41.8	36.1	3.3	6.7	5.3	6.8
	Provincial [a]	38.0	34.1	6.2	7.4	4.8	9.5
	Local [b]	19.4	37.5	12.2	19.7	5.8	5.4
7. Partial cutting is better than clearcutting for maintaining other forest uses and values.	National [a]	47.8	36.1	4.3	3.6	1.6	6.7
	Provincial [a]	38.7	44.6	5.5	3.0	0.8	7.4
	Local [b]	28.1	41.7	12.2	9.6	1.9	6.6

The 'Cloncurry Model': Developing Partnerships For Sustainable Rural Practice

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Abstract

This two-part presentation outlines the on-going process of developing a model of sustainable medical practice for the towns of Cloncurry and Julia Creek in NW Queensland (Australia). The first section deals with the rapid community appraisal upon which the model is based, while the second section covers the negotiation process which led to an arrangement to contract hospital based medical services to a non-government medical service provider.

Objectives

The rapid appraisal identified community characteristics, needs and expectations important in recruiting and retaining suitably skilled GPs. More specifically, the aim was to positively influence GP recruitment and retention; better match GP skills and services to community expectations; and to improve community health through support for local assessment, assurance and policy development.

The overall objective is to develop a sustainable model of general practice capable of attracting and retaining a requisite number of suitably qualified medical practitioners. The aim is for the model to be self-supporting and capable of continuing regardless of medical practitioner movements. The basis of the model is to attract experienced medical practitioners with high levels of skills appropriate to the needs of the community.

Method

The rapid community appraisal consisted of document review, facility review, interviews with key community members and stakeholders, medical and other health practitioners (past and present), Queensland Health, public meetings and facilitated public strategic planning session.

The model being developed is a tailored adaptation of one proposed in a national study of sustainable models of rural practice in addition to experience gained from an innovative service contract developed for another remote Queensland community. Key considerations include service use data, community and provider needs, in consultation with community members, stakeholders, Queensland Health and others. The Queensland Rural Medical Support Agency and Mt Isa Centre for Rural and Remote Health have driven and facilitated the process.

Results

Contractual negotiations are nearing an end, with a view to advertising the contract by June 30. Both the model and the contract have required considerable willingness, by all players, to be flexible and visionary. The presentation reports on progress up to March 31, 2000.

Conclusions

Community consultation and involvement in the development of a new, locally based and supported model of health service is essential. All players in the process must have realistic expectations, mutual respect and flexibility so that the resultant model has the greatest chance of success. An organisation which can both facilitate the process and support the outcome is essential.

Introduction

Australian workforce reports continue to demonstrate that rural and remote communities have difficulty maintaining an appropriately qualified medical workforce (AMWAC, 1996). The shortfall in practitioner numbers is difficult to estimate and appears to vary across the nation. While attracting medical practitioners to communities that appear to be quite attractive in terms of climate, distance from major centres and local recreational opportunities is difficult, it is even more so in more remote communities which boast few, if any, of these attractions.

The maintenance of an ideally distributed medical workforce involves a complex set of issues that includes consideration of how medical graduates are recruited into rural practice and how they are supported once there. Little is known about successful recruitment strategies, which appear to rely on either marketing strategies, government coercion of recent graduates, short-term financial incentives (Holub & Williams, 1996), or combinations of these. Marketing is more difficult in those more remote communities perceived to be less attractive. More recent initiatives have focused on longer-term strategies which interest medical students and GP registrars in rural careers (Hays, 1996), but their effectiveness cannot be evaluated for some time.

More is known about the issues that contribute to why practitioners do not remain in rural practice (Hays, Veitch, Cheers, & Crossland, 1997). These include: limited family support, education and career opportunities; poor local support, such as inadequate housing and personality clashes with important people; and limited personal professional development opportunities. The latter issue is being addressed through government support for CME and locum schemes (Holub & Williams, 1996), but the first two are more difficult without an analysis of the characteristics of each community. One study, however, demonstrated that 'socio-cultural integration' is the pre-eminent retention issue for rural practitioners and that communities can play an important role in this regard (Cutchin et al., 1994).

An approach to recruitment and retention that has proved successful in North America is the involvement of rural communities in collaborative planning with other stakeholders that integrates local community support with government and professional strategies (Alfero, 1994; House & Hagopian, 1994). University-based facilitators work with communities and other significant groups to determine local needs, identify available resources and reach agreement on strategies that better match applicants to communities.

This two-part presentation outlines the on-going process of developing a sustainable medical practice centred on the town of Cloncurry, with a branch arrangement for the nearby town of Julia Creek in NW Queensland (Australia). The first section deals with the rapid community appraisal upon which the model is based, while the second section covers the negotiation process which led to an arrangement to contract hospital-based medical services to a non-government medical service provider. The process has been in progress for more than two years, and is still some way from finalisation. The presentation focuses on the obstacles encountered during that time and their solutions.

Cloncurry and Julia Creek

Briefly, Cloncurry is a growing community of approximately 3800 people, 120 km east of Mt Isa. A number of government utilities are located there, including regional offices of the State Government Departments of Main Roads and Railways. The economic base is beef and mining. Health services include a 36-bed hospital with 2 medical practitioners, hospital pharmacist, commercial pharmacist, aboriginal health centre, privately-owned and managed retirement village, dentist and Queensland Ambulance Service. At the time, there was also a private GP, with more than 40 years service to the community who, although then living in Mt Isa, still did 2 sessions per week in Cloncurry. Unfortunately, this practitioner died late last year. The community has had considerable difficulties in recruiting and retaining medical practitioners over the past decade. Demographically, 21% of the population are of Aboriginal descent. 21% of the population are aged 50 years and over, 6% are unemployed and 20% are not in the labour force.

Julia Creek is a small, declining community of approximately 1,400 people, 130km east of Cloncurry. Like Cloncurry, its economic base is beef and mining. Health services include a small hospital with 1 medical practitioner and the Queensland Ambulance Service. The medical practitioner, who had been there for several years, has recently left. Demographically, 3% of the population are of Aboriginal descent. 21% of the population are aged 50 years and over, 3% are unemployed and 14% are not in the labour force.

Part 1: Community Consultation – Rapid Participatory Appraisal

The basic premise of this phase of the project was that continuing community involvement in GP recruitment and retention is essential. It would appear that many Australian communities, having recruited a GP, then withdraw - leaving the GP to their own devices. Retention, however, is NOT an immediate follow-on from recruitment. The retention of a GP and their family is an on-going process in which the community should be actively involved, as well as recognising this as an important commitment. In addition, it is more and more the case that practitioners setting up in rural areas have pre-determined expectations about the length of time they will spend in an area (Hays, Veitch, Cheers, & Crossland, 1997). It is therefore important for communities to recognise that while a

At the time this phase was undertaken (late 1997), none of the structures pivotal to the second phase were in place. Originally, the broad purpose of this project was to assist the community of Cloncurry to develop plans and strategies for recruiting and retaining general practitioners, by heightening awareness of local abilities and opportunities. The aim was to facilitate a community-empowering process that would enable the Cloncurry community to take responsibility for developing, implementing and maintaining those plans and strategies. The process is described elsewhere, although the key elements are presented here (Veitch, Harte, Hays, Pashen, & Clarke, 1999).

Method

Stage 1 Rapid participatory appraisal (RPA) A simplified version of the RPA method outlined by the WHO (WHO, 1988) was employed. The method is based upon the premise that, in order to fully understand the health care needs of a community, information needs to be collected from across four levels of activity (Murray, et al., 1994):

- community composition: organisation; structure; and capacity to act;
- disease/disability; environment - physical, socio-economic;
- services - educational; health; social;
- health policy - local; state; national.

Emphasis was given to those components that the community could influence and which were most likely to improve medical practitioner recruitment and retention.

The initial visit involved discussions with 20-30 key community representatives (identified by a cascade recruitment method) in order to establish community links and to gauge the community's mood and receptiveness to providing support for GPs in order to improve retention. A further 20-30 individuals were subsequently contacted by telephone.

practitioner will probably not stay forever, they can be assisted/encouraged to stay for at least as long as they planned. This will probably involve communities needing to review their attitudes and expectations regarding medical services in their areas, e.g., practitioners' length of stay, payment issues, necessary versus desired practitioner skills, etc. A dedicated external agency can therefore play a key role in maintaining community focus by providing assistance and support, as required.

Stage 2 Thematic grouping of issues The interview data were collated and grouped into a series of key thematic groupings. The groupings included local health care and service needs; GP characteristics, personal and professional needs; community characteristics, skills and capacity.

Stage 3 Open Community Meetings During the second visit, group meetings were held with the people who had been interviewed earlier. The thematic groupings of information were used as the focus for identifying broad objectives and developing specific proto-strategies. These proto-strategies were then presented at a subsequent wider community meeting, which narrowed attention to specific actions and to specific people and/or community groups who would be responsible for carrying them out. A final plenary session was held to present the small groups' results and to seek ratification from the meeting.

Stage 4 Subsequent meetings with community Follow-up meetings with the community groups have continued under the auspices of the Queensland Rural Medical Support Agency, Mt Isa Centre for Rural and Remote Health and the local Rural Division of General Practice in order to maintain enthusiasm within the community and provide additional assistance as necessary.

Results

The community had, in the past, attempted to recruit and retain GPs. Several factors had contributed to previous difficulties. These included:

- lack of knowledge about how to progress a strategy;
- lack of resources;
- personal conflicts between individuals or within groups;
- illness in practitioner's family and partners which have caused practitioners to leave;
- burnout of key players;
- groups growing stale, either because of slow progress, or changed focus;
- unrealistic expectations about how long a GP should remain;
- bureaucratic barriers.

Their perceived lack of success had generated an element of scepticism towards renewed efforts. Indeed, there appeared to be an element of 'learned helplessness' extant in the community. Many believed that, no matter how committed the community was, most practitioners would move on after a short while. The turnover appears even higher, because Queensland Health (the state government department of health) fills vacancies with short-term locums from the base hospital in Mt Isa. As a result, many residents had established links with long-term practitioners in nearby towns and expressed reluctance to begin visiting new practitioners in Cloncurry for fear that they might soon be gone. There was also a mismatch between community and medical practitioners' expectations about what services could be provided.

Nonetheless, community members recognised that they could play a role in enhancing recruitment and retention and identified a number of objectives/strategies:

- Form a liaison committee to interface with other stakeholders;
- Develop information packages for prospective applicants;
- Form a welcome process that helps practitioners and families settle in;
- Address quality and appropriateness of housing;
- Sponsor a medical student to spend time in the community;
- Consider spouses' education and employment needs.

The resources involved in realising these initiatives were a major concern to community members, although there was willingness to contribute community funding to produce a long-term benefit. At the completion of the process, the community had an agreed action plan for recruiting and supporting medical practitioners and was keen to implement it. That said, the community was slow to act and was unable to identify potential sources of information and financial support. The facilitators, the North Queensland Rural Division of General Practice and the newly established Mt Isa Centre for Rural and Remote Health (MICRRH) provided assistance in this respect. Nonetheless, the community made little progress towards realising the above objectives – something which we attribute to the 'learned helplessness' discussed earlier.

In mid-1998, the Queensland Rural Medical Support Agency (QRMSA) was established with funding provided by the Commonwealth Government. The principal brief of the Agency was to increase the rural medical workforce in Queensland. Around the same time, a national study of the characteristics of sustainable rural practice (of which the principal author was a member) was completed (Strasser, Hays, Togno, McCallum, & Little, 1994). The report included descriptions of 7 categories of sustainable rural practice, the key components of each and estimated costings for their establishment. The key components of a sustainable rural practice in a small town with hospital are set out in the table below.

Dennis Pashen, the Director of the Mt Isa Centre for Rural and Remote Health (MICRRH), recognised the opportunity for testing the above model in Cloncurry and the nearby community of Julia Creek, under the auspices of the QRMSA. Using the findings of the RPA and the national study of sustainable rural practice, Dennis and Nicola Lawrence (CEO, QRMSA) developed the proposal for what we call the 'Cloncurry Model'. This is the focus of the second part of this paper, with particular emphasis on the obstacles encountered and the solutions to these.

Part 2: Cloncurry - Obstacles And Successes

The Model

The aim of the proposal was to ensure that all the essential components for a sustainable rural practice were in place. The findings of the RPA thus took on significance beyond that project's original aim. In addition, the RPA had primed the community for action and change. MICRRH's brief is to provide training and support for health professionals working in NW Queensland and to foster community involvement and ownership in this respect. The advent of QRMSA, which had both the funds and the brief to directly fund innovative programs for increasing rural practitioner recruitment and retention, completed the necessary 'external' resources picture. The task then was to develop a proposal, suitable to the community, medical practitioners, the Commonwealth Government (the funder of the QRMSA) and Queensland Health (the Queensland Government's provider of public health services in Queensland).

The basis of the proposal was a contract between QRMSA (acting on behalf of the community) and Queensland Health for a group practice of 3 – 4 appropriately trained GPs to provide all services to the communities of Cloncurry and Julia Creek. The commitment was to increase the sustainability of existing services, recruit and retain experienced and appropriately trained GPs, thereby providing certainty for both the practitioners and the communities, and perhaps increase locally available services (eg. reinstate obstetrics and surgical services). Although there has been one other instance of GPs taking over the public services in a rural Queensland town, the concept is not well-appreciated by other communities. Health services in Queensland have been based on a publicly-funded system for more than 50 years, so there is some reluctance and concern about changes which involve contracting formerly 'public' services to private practitioners, both in rural communities and in Queensland Health.

Facilities and resources

Queensland Health has two allocated medical practitioner posts in Cloncurry Hospital and one post in Julia Creek Hospital. The Julia Creek post and one of the Cloncurry posts are for Medical Superintendents with right of private practice (under this arrangement, a proportion of the practitioner's income is a guaranteed salary for practice and administration in the public hospital, while the remainder is achieved through fee-for-service private practice). The second post in Cloncurry is for a Medical Officer with right of private practice, who works under the direction of the Medical Superintendent in the public setting, but whose income is also supplemented through private practice. Generally, the Medical Superintendent positions have been filled but, more often than not, the Medical Officer position has been vacant. Vacancies are filled by Queensland Health-indentured practitioners who are rotated through for six to twelve week periods. Because of the rotating nature of the Queensland Health practitioners and the fact that Cloncurry's only private general practitioner was no longer resident in the town, there had been little or no cooperation between the practitioners for on-call duty and relief for holidays and CME etc. The practitioner in Julia Creek has always worked on his or her own, with a Queensland Health-supplied relieving practitioner covering the regular practitioner's one week off in every six.

The practitioners in Cloncurry have been provided with a surgery for their private practice, as has the practitioner in Julia Creek. However, both surgeries are inadequate for their intended purposes and do not meet accreditable standards, despite the surgery in Cloncurry being recently rebuilt. Herein lies one of the anomalies of rural and remote practice in Queensland. Queensland Health builds, owns and refurbishes most of the medical facilities, but does so according to its own standards, which rarely meet those set by the Commonwealth-supported practice accreditation scheme – specifically aimed at providing additional funding to practices which meet those standards. Thus, Queensland Health practitioners who have 'right to private practice' do not have the opportunity to maximise the component of their income that comes from private practice. Queensland Health also provides housing for each of the practitioners in Cloncurry and Julia Creek (the house and surgery in Julia Creek are in the same building). However, the three houses are basic, at best, due to an ongoing lack of maintenance and the smaller niceties such as landscaping, not being looked after.

There has been no comprehensive obstetric or surgical service in Cloncurry or Julia Creek for some time. Individual practitioners can undertake procedures for which they are either qualified or have an interest and for which local support (e.g., nursing and facilities) is available, within Queensland Health budgetary constraints and medico-legal bounds. In recent times, practitioners in each town have not provided such services and Queensland Health has taken the opportunity to transfer equipment and support to other centres such as Mt Isa. The RPA found that this has caused much angst within the populations of each community, partly because Queensland Health and the practitioners have not adequately communicated the reasons to the communities.

The Plan

The intent of the plan was to develop a sustainable private general practice/medical service, by linking Cloncurry and Julia Creek to create a three or four practitioner practice with the main practice of three practitioners being in Cloncurry and a branch in Julia Creek for the fourth practitioner. This private practice would then hold the contract for hospital services in both towns. There would be one set of overheads for the private surgery, shared after hour services, and internal leave support (instead of relying on external locum services). The concept that, in order to be sustainable, rural and remote practices should have more than one practitioner is not new (Holden, 1990).

Currently, the site of the Queensland Health- provided private practice surgery in Cloncurry also includes separate buildings for the Community Health Service and the Dental Service. It was originally envisaged that the three buildings could be incorporated with some judicious extensions to make one health service building. It was hoped that, with three or four appropriately recruited and trained practitioners working together, they would also be able to provide obstetrics and surgical services through the hospitals. Indeed, there were sufficient deliveries, which could be dealt with in the hospital by appropriately trained practitioners, recorded for Cloncurry residents during the 1993-1997 period (>60 per year) to warrant establishing a viable obstetrics practice. An additional practitioner's house in Cloncurry was also proposed in the original plan.

The rationale for the proposed service

Working as a group practice and sharing the hospital work would ensure a far more equitable workload between the practitioners, as well as ensuring sufficient internal support for emergencies and planned annual and education leave. This would ensure that two of the major retention issues, practitioner support and quality of life (Cutchin, et al., 1994; Hays, Veitch, Cheers, & Crossland, 1997; Veitch, et al., 1999), would be better addressed, as well as reducing the need for external locum support. The economics of the practice would also be more beneficial for all the practitioners through having only one set of overheads rather than four. Community involvement has been ongoing – through the rapid appraisal process, the planning phase and the implementation stage, so there is a degree of 'corporate memory' amongst the community and a developing ownership of the proposed model. The only situation where such an arrangement currently exists in Queensland is in Longreach, where the hospital contract situation has been generally well accepted by both the community and the practitioners.

One of the essential ingredients for this model to be sustainable is dollars. Funding has become available through the establishment of the state-based, but Commonwealth-funded, rural workforce agency (QRMSA), which has a mandate to implement sustainable models. The final reason why this model should be able to work is that the General Manager, Health Services, of Queensland Health, has been supportive of this contract model of sustainable general practice from the beginning. Indeed, he was instrumental in the establishment of the Longreach contract.

Progress to date – 'warts and all'

The Contract

For eighteen months, we have been working with Queensland Health towards the contract for hospital services within Cloncurry and Julia Creek being put out to tender. It has not yet occurred. There has been a lot of goodwill on the part of all players, including Queensland Health, but along the way there have been various obstacles that have slowed the process. Although it has usually been hard to put a finger on the exact reason, the latest had hit us like a load of bricks - the labour Unions. The current Labor Government in Queensland has signed an Enterprise Bargaining Agreement with the Unions which prohibits the contracting out of services, except where all other recruitment processes have failed, as is the case in Cloncurry and Julia Creek. It took some time to receive the blessing of the Unions to continue with this contract (February 2000). Most encouragingly, the breakthrough with the unions can be attributed to the personal representation made to the Enterprise Bargaining Committee by members of the Cloncurry Council and community. This has been a major advance in the community's involvement and ownership of the process. Up to this point, the community had tended to play a lower-key role, deferring to the proponent organisations in most instances. The community's preparedness to take the lead role in this instance, augers well for the community eventually taking full responsibility for both the contract and monitoring sustainability.

Recruitment

One practitioner was appointed to Cloncurry over 12 months ago on the promise that the sustainable model was just around the corner and so, in the mean time, has been employed in one of the Queensland Health positions. This practitioner is still in Cloncurry, despite the fact that the contract has yet to come into being, and she is showing great patience in this regard. She has had first hand experience of some of the problems in Cloncurry – such as getting suitable relief and community demands for a local obstetric service. Additionally, since the death of the long-standing private GP, she has been carrying a very heavy workload with only the assistance of temporary relieving practitioners. Once the contract is in place, it will be very important to match the personalities and skills of the other two practitioners recruited for Cloncurry and the one for Julia Creek, with those of the current practitioner. Quite frequently we hear when practitioners leave towns, that personality clashes have been a strong factor in their decision to leave.

Finance

In the middle of 1999 we achieved a major success in terms this proposal when we gained agreement from all three levels of government (local, state and federal) to help fund the sustainable model in Cloncurry. The Local Government agreed to raise a $12 per household levy on the rates to put towards the capital infrastructure costs. The State Government agreed that they would be able to "donate" practitioners' houses, surgery and land in some form or other, or be able to cash out items such as the practitioners' houses in the contract price. Finally, the Commonwealth Government was putting in funds, through the QRMSA, and possibly through a separate funding allocation specifically for sustainable models. Unfortunately, in the latter half of 1999, we encountered another obstacle in this respect, brought about by a change in the top-level public servants responsible for rural workforce funding. The new people had a different view of how rural workforce agencies (RWAs) could spend their money on promoting sustainable practice. Thus, although the Commonwealth had been involved in the planning of the Cloncurry sustainable model from the very outset, they now interpreted the contracts with the RWAs to mean that they would not endorse RWAs spending more than $5,000 on any capital infrastructure. As the original plan involved some major extension works on the surgery and the building of a house, there could be no guarantee that the RWA would not be committing more than $5,000 towards capital infrastructure. Again, this barrier has not stopped us, but made us think more laterally and it may well be that instead of putting the money into capital infrastructure, the RWA will have to look at leasing incentives and provide assistance for a fixed period for leasing premises and accommodation. As it happens, the Cloncurry council is soon to have some of its own premises available, perhaps for lease.

Community Support

As previously mentioned, the Community has been involved from the outset and this is tremendously encouraging. However, occasionally that involvement has not materialised into action such as a commitment by the Health Liaison Group to provide some landscaping in the practitioners' houses, which has turned into a 'catch 22' situation. The Health Liaison Committee is waiting for us to recruit someone so that that person will be on hand to maintain the gardens, however, potential practitioners visiting Cloncurry have been put off by the state of the gardens and other quality of life factors.

The issue of bulk-billing (where medical practitioners directly bill the universal health insurance scheme, instead of the patient) has also been an area where community support has been difficult to monitor. Under the national bulk-billing arrangement, medical practitioners receive 85% of the scheduled fee-for-service that they would get if they directly billed the patient (most private practitioners in rural areas charge more than the scheduled fee as a means of off-setting other costs such as fuel, freight, locum relief, etc). The arguments for community acceptance of fee-for-service billing in Cloncurry have been canvassed with some of the community, who see its potential for increasing practice sustainability and thus practitioner retention. However, it remains a very contentious issue in the town. There is clearly a need for a major community education /consultation process in this regard, which will be undertaken before the contract is finalised. Additionally, because the contractual process has been so protracted, it has been difficult to maintain the momentum of support within the community.

Training

Appropriate training and skills maintenance for the resident practitioners is a key component of the proposed contract. We see MICRRH as playing the lead role in this respect, with support from the School of Medicine in Townsville, QRMSA and the local Division of General Practice. A by-product of the process has been a strengthening of the links between the various external players – to the point where Memoranda of Understanding have been established between the various organisations to ensure that there is adequate training and support ready and available for any new recruits.
Conclusion

Have we thought of everything? (Or is the unknown barrier still waiting for us?)

At the Australian Divisions of General Practice Annual Conference in August, 1999, Professor Roger Strasser reminded us of the three main elements which were identified in the sustainable rural practice consultancy (Strasser et al., 1998). These were -
A Community Contract

A Practitioner Support Package
The Viability of the Practice

The model we have proposed, as originally documented by Associate Professor Dennis Pashen and modified by the Working Party over the last eighteen months, has addressed each of these issues, so in theory our model should work. If we can keep up the momentum and the goodwill to implement it, we will have capitalised on the RPA and sustainable rural practice consultancy findings, along with the start that was made with the Longreach model. Hopefully, we will have put into place a system that can be duplicated in other remote towns which have had ongoing long term recruitment and retention problems.

Acknowledgements

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Feature	Core component
Community	Community representative organisation present
	General practices service agreement
Service structure & organisation	24 hour access to service
	Provision of core clinical services
	Provision of emergency response
	Management of acute & chronic illness
	Public health – education; screening; immunisation, hygiene & sanitation
	Capacity to provide Aboriginal health services & women's health services
	Practice accreditation under RACGP practice standards
	Local standard treatment guidelines
	Other health service staff trained to support core services
	Medical defence premium for major procedures paid by hospital
	Service mix includes hospital inpatient services
	Hospital staff trained to support hospital-based services
	Hospital accreditation
Practitioner	Contracted length of stay
	Contracted financial package consisting of base payments (retainer), + fee-for-service incentive payments, relocation costs & housing rental subsidy
	Appropriate training & skills maintenance for core services
	Training & skills for hospital-based services
	Training in skills for operating theatre procedural services
	Minimum 4 weeks annual recreation leave
	Minimum 3 weeks annual study leave
	Minimum 1 in 3 call rostering
	Guaranteed locum relief for minimum leave requirements
	EMST training or similar emergency skills training
	Formal program of mentor & family support
	Provision of childcare for GP's children
	Guaranteed agreed minimum income
	Cross-cultural training
	Vocational registration
	Meet QA & CE requirements of RACGP

KEYNOTE ADDRESS
Understanding the New Rural Economy: Options and Choices

Bill Reimer, Canada

I certainly want to thank you, Jim, for inviting us. It is wonderful that we have been able to come and join in with your conference. I think it is exciting that you have established this network internationally, and that we can blend in with it in such an easy manner. We look forward to working with you in the future. Thank you very much.

I also want to thank the BC Government who helped us to get here, the Department of Community Development, Cooperatives, and Volunteers. In addition, much of our research relies on a number of different organizations supporting us over the years. For example, the Federal Government through its Department of Human Resources, Statistics Canada, Agriculture and Agri-food Canada, and in particular the Rural Secretariat.

It is very nice to be in Nanaimo -- it is a bit like coming home. I ended up spending a couple of weeks up on the top of Mt. Benson in the Forest Fire Look Out Station there about twenty-seven years ago. The area is quite familiar - at least looking down on it is quite familiar.

I want to discuss today what I have entitled the "New Rural Economy in Canada" and I want to acknowledge the important contributions made by my colleague Peter Apedale. He has kindly agreed to answer all the difficult questions that come up and I'll take the easy ones.

Pressures of the New Rural Economy

Rural Canada is undergoing major changes: its economy has become more open and complex, its services have been downsized, its political influence has declined, and its population has become more mobile. These are not unique to Canada, as many of you will know, but they do have outcomes that are special within the Canadian context. This presentation will outline several perspectives on those changes. They will be organized under three major questions .

First of all, "What is new about the new rural economy? What makes it different in Canada?". Second, I will look at some of the critical consequences that the new rural economy holds for rural Canada, and finally I will turn to what are some of the policy options emerging from our analysis of the new rural economy.

The perspectives offered here are largely the result of eleven years of collaborative research in the Canadian Rural Revitalization Foundation. (We have changed our name to try and be a little bit more upbeat. 'Restructuring' has a bad name these days.)

We have also been undergoing three years of much more intensive work within what we call the New Rural Economy project. Over the eleven years working on rural issues, we discovered that there was not enough information about rural Canada. There was also not enough collaboration on ongoing projects and we decided to launch a specific project: a five year project called the New Rural Economy. This research involves macro level analysis, looking at the general context of rural Canada and it also includes systematic long term field work in thirty-two sites: what we like to call a 'rural observatory' on rural Canada, to flesh out the details at the local level. So we systematically selected thirty-two sites across the country and have had field teams working in those sites to generate ideas, to collaborate with the local people, to ground truth our ideas, and to explore new development options.

I want to first of all talk about some of the major pressures that the new rural economy is facing in the last few years. The general pressures conditioning the rural economy are largely shared by those in urban centres and other parts of the world, however, they are strongly mediated by national and local conditions: making their consequences unique for different locations and for different types of people in those locations. It's in the interactions between those pressures at the local context that the complexity of rural Canada can best be understood.

I have identified four interrelated aspects of the new rural economy to represent those pressures. First of all of course, there is the pressure of technology. Technological innovations are crucial ingredients in the dynamics of the new rural economy. Canada's traditional dependence on resource extraction has meant that the labour-shedding characteristics of extraction technologies have radically changed the rural landscape. Our farms, forests, waterways, oceans, and minerals have felt the impact of those technologies and the reorganization of production that they bring. In the process some rural communities have become more connected and more like their urban counterparts while others have disappeared.

The second pressure on the rural economy comes from the markets. The technology has not been developed or used in a social or political vacuum, however: the structure of economic markets has contributed to its growth in certain directions and not in others. Technology for example, has been used to standardize production rather than diversify it, to shed labour rather than socialize it, to extract resources rather than sustain them; and to increase economic inequality rather than to reduce it. In Canada our resource economies have been commodity based for the most part and except for the automobile industry we have largely depended on the shipment of the raw materials for our wealth. The organization of those industries has been highly concentrated and in the modern global economy these tendencies have increased. At the same time the ability of rural people to extract value from those commodities has diminished.

Both technological development and market pressures have in turn placed the environment in jeopardy. We now have the ability to empty the oceans of fish, to remove the top soil from the land, and strip the hills of their forests. Competition from around the globe and the high level of foreign ownership in our industries has meant that we have acted on that ability in the interests of short-term gain rather than seek sustained use of these resources.

The limits to this strategy are now increasingly apparent. Environmental limitations have forced us to reconsider how we extract and use these resources and to reevaluate our treatment of common property. The legacy of technology, market concentration, and environment has significantly conditioned the ideological and policy bases of Canadian society as reflected in the Canadian state. Our dependence on global trade has traditionally dominated the government's economic policy, producing a commitment to commodity trading that includes the state as an active partner. These commitments conflict, however, with the state's other roles as a custodian of common property and a provider of social services. Preoccupation with the selling of commodities, the expansion of markets, and short term profits means that common property services such as food security, rural amenities, and the environment often go unprotected.

The Three Rural Canadas

When evaluating the consequences of these types of pressures we have found it useful to consider rural Canada as not one but at least three rural Canada's. We have our colleague, David Davella to thank for the introduction of this distinction into our discussions within the CRRF network. David is a colleague from Mexico.

Rural Canada One, consists of those people and organizations that are well connected to the global economy. They pay using preferred credit, travel first class, enjoy strong property rights, supported by mercantile arrangements with the state. They are the resource corporations, the banks, the utilities, doing business in rural Canada. We estimate they comprise about five to ten percent of the rural population.

Rural Canada Two is deeply involved in domestic and regional markets. They pay using debit cards, are involved in local and regional concerns, enjoy property rights, most often in the form of land, and benefit from the entitlements provided by the traditional welfare state. They are the employed men and women of rural Canada, the volunteers in rural communities and the backbone of the informal economy. We estimate they represent about sixty to seventy percent of the rural population.

Rural Canada Three are those excluded from the mainstream of rural society. They are often without credit, are unemployed or under-employed, have few property rights and suffer uncertainty in their entitlements: often depending on the whim of governments and most susceptible to the withdrawal of services. They are frequently trapped in poverty or near poverty with few resources to escape. They are the youth, the seniors, the single parents, and the aboriginal peoples of rural Canada. We estimate their numbers to be about thirty-five percent of the rural population.

Consequences of the New Rural Economy

Each of these groups faces the new rural economy in dramatically different ways, they have responded in various ways, and their needs are diverse. Therefore, the consequences are different. If we look, for example, at the consequences for **Rural Canada One**, they have made considerable use of the new technologies. They have adopted the strategies of standardizing products, corporate concentration, and mechanization to meet the challenge of global markets and have done so in a largely successful manner. This is reflected in agriculture, for example, by the increasing size of farms, with a greater share of the farm income going to the larger farms. International competition however, has created significant problems for them, since the proliferation of trade disputes and uncertainty in trade policy makes planning and negotiation difficult. This problem is exacerbated by our heavy dependence on the United States' economy and trade in particular.

Rural Canada One is also facing increasing pressure from the environment and environmentalist lobbies. Their use of large scale production, preferred access to resources, and urban orientation have made them vulnerable to criticism from both rural and urban groups. Depleted fish stocks, clear cut logging, grain elevator closings, and oil spills have become symbols for their lack of concern for the environment and for rural communities.

Looking at **Rural Canada Two**, they have faced considerable challenges as part of the new rural economy.

The labour-shedding nature of the new resource technology has meant that large areas of rural Canada have become depopulated. Natural resource employment has become a part-time activity for more people, even farmers. The mercantile commitments of the state have meant that local entitlements for both property and services have been determined by factors beyond their control. The external origins of these entitlements have made changes appear arbitrary, unrelated to local action or conditions, and very unpredictable. In addition, rural communities have in turn suffered as local markets have disappeared and state services have been withdrawn as a result of declining populations, cost-cutting, and most recently international pressure on entitlements to property and services.

All of this has meant that rural communities have significantly diminished capacity to self-organize in response to these problems. The traditional artisan skills of rural industry, the associative relations, and reciprocity of local social organization are inappropriate in many cases for the market, bureaucratic, and legal relations in the new economy -- leaving rural citizens at a significant disadvantage in negotiations and undermining the heritage, identity, and cohesion of rural economies and rural communities.

Those who are part of **Rural Canada Three** are even more vulnerable than Rural Canada Two to the capricious changes in entitlements on the part of the state. Plus, they are less able to have their voices heard. They are among the lowest educated in both urban and rural regions and are most often the least able to move, thereby being most affected by the lost service that has occurred in the new economy. It is only through transfer payments, for example, mostly to the elderly and seasonal workers, that increased poverty has been avoided in rural areas. Unfortunately, this has increased dependency on the state. The situation for those in Rural Canada Three is exacerbated by the stigmatization that goes with their exclusion and marginalization.

I want to add here, as well, some of the consequences for urban Canada from the new rural economy. The pressures of the new rural economy have also had important impacts on urban regions. Large-scale production, standardization, and the genetic modification of food have come under attack by urban consumers as their fear for food quality grows. The depopulation of rural areas means that the husbanding, commitment to land, water, and habitat on behalf of urban dwellers is likely to decrease as awareness and presence in rural areas diminishes. The loss of communities also means the loss of social diversity, heritage and creativity that they foster. As communities disappear so does the cultural diversity they represent, the services they provide and the amenities that they protect. Replacing these features of our heritage will be increasingly difficult even as the demand increases.

Policy Options

I'd like to turn to discuss some of the policy implications that stem from this particular perspective, but first of all I am going to identify a few of the general principles that we have been considering within the CRRF network. We use them to look at those policy implications through what we call the rural lens. We assume for example that a strong Rural Canada is crucial for a strong economic and social Canada. This strength comes from the ability of rural people to self-organize. Building rural capacity to self-organize, therefore, becomes a priority in our policy proposals.

Unconstrained industrialization of rural activities in Canada has undermined the ability of rural people to self-organize in a context of an export-based economy, high concentration, high foreign ownership, and mercantilist policies. It means that decreasing populations, loss of artisan approaches to production, and forced out-migration occur. The sectoral approach that has been adopted to date is outmoded in the new rural economy since it's insensitive to the interactions between the sectors. It undervalues rural communities, their social relations, and identity and doesn't recognize the new features of rural places and spaces that are emerging in the new rural economy. No longer are they simply the means by which commodities are produced but they now provide services and manufactured goods, they protect habitats and amenities, they manage territory, and process urban pollution. The states' traditional base in mercantile relations takes control from local communities by removing their access to added value and reducing their ability to self-organize. Our approach therefore, should be built on the capacity that exists. This means providing the information and resources that allow rural people to identify opportunities and respond to them in appropriate and speedy fashion. Thus the state should get out its involvement in the resource business and focus on building local economic and social capacity.

This means different things for each of the Rural Canada's and I'll turn to those now. Looking at **Rural Canada One**: this needs a clearer playing field, not necessarily a level one. The challenges we face from international trading partners need to be addressed in a consistent and forceful manner so that we are less vulnerable to the interests of those partners. We propose for example, that codes of practise such as the ISO 14,000 series be given priority over economic efficiency alone. This will have the effect of reducing the advantages of economies of scale that undermine rural communities and natural resource environments. These codes will at the same time provide institutional and economic mechanisms for the recognition of social, environmental, and cultural interests.

We argue for a stronger competition policy to remove the negative vestiges of the mercantilist entitlements and concentration that disadvantage rural enterprises. We also support the principle of multi-functionality in the approach to resource development and trade. This approach recognizes the complexity of the rural economy and the limitations of a sectorial focus and it will serve as a basis for policies that compensate rural people for the non-market contributions that they make to all Canadians.

Looking at **Rural Canada Two**, we feel that the state should proceed to move out of the business of trading commodities. This can include distributing the rights over crown property to new local institutions. Citizen development corporations, for example, have been used in Japan to significantly increase the economic capacity of local groups. Examples from the Canadian context include the Nanaimo Development Corporation on Vancouver Island and the Revelstoke Community Forest Corporation in the Kootenays. Other local property-owning institutions where the division of power, responsibility, and resources increases the self-organization capabilities of local communities, should be explored. Recent negotiations with aboriginal people provide models for such arrangements as does our experience with cooperatives, community forest management and regional development organizations.

Particular attention should be given to building service, knowledge-based, and amenity-enhancing activities. Support for NGO global networking would increase the access to world markets and opportunities for Rural Canada Two. Our research has identified many examples where individuals and groups in remote locations have gained access to global markets through the use of modern communication technology. The restoration of local banking services would help to solve the lack of financial capital, and maybe even more importantly, provide pressure on the banks for a more appropriate vision in and for rural places. This would facilitate local access to capital and information and help teach the skills necessary for operating in market relations.

Sustainable futures for local communities are only possible where they are able to more effectively capture economic value. In general, policy and action should support the development of a local learning culture: one that seeks new information, learns how to use it, and generates new visions for the future. Our research on the voluntary sector, for example, shows that local groups are more actively involved with municipal and regional governments than the federal one, yet these levels are least able to provide the finances and the infrastructure that is necessary to support third sector organizations. This needs local governance reorganization to give it the necessary power and resources to capture more value.

All of these policy proposals assume a strengthening of the service role of the state. Under the rubric of privatization, the state has abdicated its role as protector and promoter of common property and public interests. As we learn more about the interdependence of all our actions and institutions, the need for such protection will only grow. This includes the protection of the environment but also the building of capacity through education, training and research, and the improvement of health and welfare services. Suicide prevention, mental health services, support for the elderly and marginalized cannot be left to an already overloaded voluntary sector.

Some of this blends into our policy proposals for **Rural Canada Three**, where the need for building capacity is even greater. In order to build financial and social capacity it is important to support collective economic activities such as credit circles, user groups, cooperatives, and credit unions. They provide the means for marginalized people to initiate projects, to learn, and to develop social supports. Human capacity can also be built through literacy education, apprenticeships, and training programs. Such programs facilitate the development of skills for jobs and market relations. They must include training for operating in bureaucratic and legal relationships as well. The new rural economy is strongly conditioned by policies, generally applied rules, and contracts as opposed to bonds of reciprocity, patronage, and common interest. The ability to function in this new context is vital to building local capacity.

Networks could be built among enterprises, entrepreneurs, and rural people to facilitate the flow of information, expertise, and support. There is a growing body of research that points to the critical nature of these networks for establishing the trust and the cohesion that is necessary for economic activity.

The focus on economic activity should not blind us to the importance of non-economic networks, however. Churches, sports, recreation groups, cultural clubs and historical societies also serve to link and build social capital that is transferable to economic and political objectives. The alienation of common property rights that is a feature of Rural Canada Three, can only be overcome through affirmative action programs. NGO's and aboriginal groups provide alternate structures for the articulation and delivery of such programs since they are already organized around local interests.

Substantial support for activities and programs that help to integrate the marginalized are also needed for Rural Canada Three. This includes those directed to special groups such as youth, elderly, single mothers, aboriginal peoples, and the working poor but it also includes policies that reflect reconciliation over punishment and alternative sentencing for offenders.

A Rural/Urban Charter

One of the ways in which we have attempted to highlight the needs and interests of rural communities in rural Canada is to talk of a rural charter. Rural Canada cannot survive on its own. The new rural economy disadvantages rural communities, does not recognize the common services provided by rural places, and it undermines the social relations that have traditionally defined the rural life. Without recognition of the fragile nature of these places the loss to our environment, heritage, and assets will be irreparable.

To avoid such a disaster we propose a rural charter: a contract between urban and rural Canada, in recognition of the importance of the rural economy for society and the environment. The charter we propose includes the following elements:

- Respect for property rights, both collective and private.

The capacity to develop locally requires access to property rights. A rural charter would include measures to identify an appropriate division of collective and individual property rights, to deconcentrate those rights to rural communities, and establish the mechanisms to protect them.

It also includes a proposal for the identification and enforcement of environmental standards.

This would re-establish the natural advantage of rural places in the face of market pressures. The ISO standards that I mentioned are a well recognized way of doing this.

We argue that there should be compensation for the non-market services provided by rural Canada.

The importance of rural Canada for environmental recovery, amenity and heritage protection, and territorial management needs to be acknowledged and supported.

Support for market competition should also be acknowledged where appropriate.

Supply and demand continue to be strong mechanisms for establishing efficient prices. The high levels of market concentration in Canada undermine this to the detriment of rural places. A more aggressive approach to deconcentration is required to overcome this disadvantage. At the same time we must be careful to identify those areas where market competition does not work. Whenever common property services such as food security, environmental protection, or rural amenities are concerned, open market principles have shown themselves to be inadequate. As we come to realize the interdependence of our social and economic activities the number and range of common property issues is likely to grow. For this reason an evaluation of the appropriate place for market organization is a crucial ingredient in the charter.

Finally we argue for the respect of civil society.

The new rural economy is most generally characterized by change and uncertainty. Under these conditions our most appropriate strategy is to create conditions where rapid, flexible, and diverse responses are possible and the ability to self-organize is built so that it can be taken for granted. Regional and national governments can facilitate these conditions by exploring new ways to support civil society and the organizations on which it is based as we search for a secure and a respectable future. Our lives depend on it.

Thank you very much.

Keynote Address
Differential Economic Performance in Rural Areas

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Introduction

The concept of differential economic performance in rural areas is built around a set of facts and a set of ideas. The facts concern empirical evidence, backed up by observation, that rural areas in apparently quite similar geographical and policy contexts, exhibit very different recent economic histories. The ideas concern the formation of *local* comparative economic advantage in a changing global and national context, the failure of traditional theories to explain the facts, and the growing importance of the question in terms of rural policy and action.

The paper starts with an account of my own journey which led to a current European research project on the dynamics of rural areas (DORA) which is investigating the phenomenon of differential economic performance in an comparative and interdisciplinary way. It then proceeds to outline the research model and the factors which it is addressing. In so doing it summarises the main conceptual, theoretical, and empirical underpinnings of the research, and in this way outlines our ideas on possible new explanations for such differences in economic performance. As the research is in progress, we cannot yet offer findings.

Background

I arrived at the question of differential economic performance in the 1990's for several different, but mutually reinforcing, reasons. First of all, one clear conclusion of the EU research programme on structural change and household pluriactivity in farming between 1986 and 1992 was that the success of farm families in coping with change and meeting their income needs depended to a large extent on the success of the surrounding rural economy (Bryden, *et al* 1993; Bryden, 1994; van den Bor, *et al* 1996). This then posed the question: what determined the success or otherwise of the rural economy, as opposed to farming?

Secondly, it was clear that rural policy was being devolved to regional and local levels, and working towards a more integrated approach (van den Bor, *et al* 1996; Bryden, 2000). This posed the question: how can local actors define a development strategy and what room for maneuver do they have at local levels?

Thirdly, a number of studies were published in the 1980's and early 1990's which emphasised the importance of 'soft' factors in development performance. These included the work on industrial districts in Italy by Piore and Sabel (1984) and Pyke Becattini and Sengenberger (1990); on the competitiveness of nations by Porter (1990); on the importance of factors such as trust by Fallows (1990) and Fukayama (1995); and on Social Capital by Putnam (1993a and 1993b). Porter, for example, argued that factors underlying competitive advantage are not given but made. Having identified five categories of factor - Human resources, Physical resources, Knowledge resources, Capital resources, Infrastructure – he argued that competitive advantage from factors 'depends on *how efficiently and effectively they are deployed'* (orig.itals. p76) and ... that 'Not only how but *where* factors are deployed in an economy is crucial...'. Although Porter was mainly concerned with competitive advantage between nations, he also made it clear that competitive advantages varied between regions.

Fourthly, the OECD's work on Territorial Indicators of Rural development and employment which emerged around the mid 1990's showed in stark terms the variability of rural economic performance even within similar types of rural geography (OECD 1994, 1996; Bollman & Bryden, 1997; Bryden & Bollman, 1999).

Fifthly, working on issues of sustainable development in 1994 (Bryden, 1994) and then later in a series of projects for NGOS (Bryden *et al* 1998; Cornish & Bryden, 1999; Bryden & Shucksmith, 2000) I re-affirmed my earlier view that more democracy and greater participation were critical issues in redefining the rural development agenda. Development was something done *by* and not *to* people.

It seemed to me that there was considerable evidence of successful economic development as well as of rural decline in what could be regarded as peripheral rural regions on the one hand, and also a lack of good research on the reasons for these differences. In addition, there were and are a number of reasons why the study of differential performance was becoming more important for policy making and implementation. These are broadly the result of two closely linked processes, namely the restructuring of the State and state policies, and the new role which local actors – agencies, individuals, ngo's and entrepreneurs –

have to play in forming the future of rural areas. I want to highlight four main points.

First, in many rural areas State subsidies and notions of universal service played an important part in helping to maintain and even increase rural employment and populations in the 1970's and 1980's. Thus public sector and related employment generally increased in areas such as health care, social services, education and public administration. In some cases also, employment related to defense activities also increased in this period. In the 1990's, these increases had halted and even in some cases reversed due to the fiscal 'crisis,' privatisation and de-regulation in telecommunications, postal services, public transport, and in some cases areas like housing and water supply, the application of cost-driven management models in health and education, and transfers or responsibilities to voluntary organisations in a number of areas. Increases in agricultural subsidies had also been normal up to the mid-1980's, and were generally curtailed thereafter. In some cases also, subsidies to mineral extraction and processing activities, and fisheries were also curtailed in this period. In general, we can observe a partial withdrawal and restructuring of State involvement which had particularly severe impacts on rural areas, and linked generally to a growing crisis of the State resulting partly from internal (national) factors, and partly to external factors such as the processes of globalisation in which powerful and richer states colluded, and the collapse of the Soviet system. Perhaps too we are witnessing the ending of the system of state capitalism which dominated the 20th Century (Hart, 2000).

Second, alongside the restructuring of the State, development policies and practice were becoming decentralised, with responsibilities being passed 'downwards' to regions and localities, especially after the mid 1980's. This meant, and means, that regions and localities have more power and more need to intervene in the formation of their own development strategies and policies, leading to a differentiation of policy and practice. This in turn leads to a policy demand to identify those areas of intervention which can make a difference to regional and local economic performance.

Third, it is clear that the role of the private sector, and especially small and medium sized enterprises, and the 'third sector', is important in local and regional economies. Processes of Europeanisation and Globalisation which are facilitated by new technologies in transport and communications and declining barriers to trade as well as the opening up of new markets (for example in former communist countries) are posing threats to existing activities in rural areas, whilst at the same time offering new opportunities. It is sme's which are feeling the pain of adjustment, and taking advantage of new opportunities. Their adaptive capacities can be enhanced by co-operation with each other and with the local and regional development agencies and with ngos, and with sme's elsewhere through networking at all levels.

Fourth, rural actors of all kinds can learn best from the experience of other rural areas in somewhat similar contexts, and less so from the experience of urban conglomerations which face a different set of circumstances. Elsewhere we call this peer-group learning. Documenting and analysing comparative experience has to play an important part in such learning processes.

The DORA research project

For these reasons, we developed a research project on the Dynamics of Rural Areas (DORA) which specifically addresses the factors underlying differential economic performance. It is doing this by use of 'matched pairs' of case study areas in four EU countries - Greece, Germany, Sweden and Scotland. Each pair comprises well-performing and poorly-performing rural areas, and these have been selected from two different kinds of region in each country. The research team has agreed to analyse ten factors which we believe from the literature and our own experience to affect economic performance at local levels. In order to address these factors we have an inter-disciplinary team with economists, geographers, anthropologists and sociologists, and are working with a methodology which is inter-disciplinary as well as trans-disciplinary.

In order to start the research, it was essential to come to a view about what was meant by 'good' and 'bad' 'economic performance'. A key indicator was taken to be employment change over a 10-15 year period. Supplementary indicators were population change, unemployment rates, rates of new business formation. However, in the course of the research we will also be finding out what people feel about their area's performance.

The research model

It was also necessary to have a working model with identified factors and variables, and a set of related hypotheses. A crucial element of DORA was the decision to study 'less tangible' factors in addition to, or rather in combination with, the more usual tangibles. These less tangibles are often considered in economic analysis to belong to the 'black box' of 'residual factors' – the 'R' in the standard production function of economics. In a formal sense, the decision to analyse less tangible factors was based largely on research on industrial districts (Piore & Sabel, 1983; Pike, Beccatini, et al 1990, and others), clusters and competitiveness (Porter, 1993) social capital (Putnam, 1993), and on the general notion that non-material resources were becoming more important to rural economies (Dawe &

Bryden, 1999; Bryden & Dawe, 1999, Bryden, 1996). However, it also reflected the experience and casual observations of the team, and thus combined an inductive and a deductive approach.

At simplest, our working 'model' can be expressed in a production-function like form as follows:

$P = f(NR,L,K,I,S) + R$
where Performance = P
NR=natural resources ('land')
L= human resourcee ('labour)
K= infrastructural capital
I= investment
S= economic structures
and R = residual factors, i.e. 'less tangibles'

Differential Performance = $P_1 - P_2$, where P_1 & P_2 are the 'performances' of study areas 1 and 2 respectively

The research team selected five less tangible factors for study.

$R = f(MP, IP, N, C, QL)$

where MP = Market performance
IP = Institutional performance
N = networks
C = community
QL = quality of life

The guiding principle behind the selection of factors, variables and research questions/hypotheses was that each should conform to an explanatory logic, to help determine the causes of differential economic performance (DEP), as follows:

$X (1...n) \dashrightarrow DEP$
(where X is a factor, the numbers refer to variables and the arrow to a causal effect).

However, since such models when used in econometric analysis often assume that variables are independent of each other it is important to point out that in DORA we hypothesise *inter*-dependence between them. For example, the actual value of natural resources is seen as depending on the performance of markets, networks, community and quality of life rather than as a variable which is somehow independent of these factors.

The list of 10 factors is a guide to comprehensive research. We do not have to ask if a phenomenon 'fits' into one box or the other. Rather, we ask of each factor if and how it draws our enquiries towards questions which would otherwise be omitted. The tangible factors will be approached primarily through the objectified public record, which should allow for fairly straightforward descriptive analyses. The less tangible factors, on the other hand, concern use and perceptions of that which is 'there', i.e. how things function (or not) in practice and how people experience them subjectively, which will require specially targeted research. The selection is based on an extensive review of the literature, as well as the experience of the participants.

Tangible factors represent the resources which are available to any area, i.e. what is visibly 'there'. They are closely linked with the traditional 'factors of production' used in the standard production function, namely land, labour, capital and technology. **Less tangibles** represent factors which determine how well or badly these resources are put to use in any area. In DORA, we are interested in the relationships between tangible and less tangible variables and the way in which they influence differential development outcomes. Some of the less tangible variables are only indirectly related to what may be affected by policy, but they may nevertheless condition the effectiveness of policy.

Tangible Factors: Discussion

Tangible factors thus deal with the objective, formal, measurable and well-established resources and structures underlying economic performance. **Natural and human resources** – abundance, quality – have been at the core of many theories of absolute and comparative economic advantage, and economic development since economics began (Smith, Ricardo, Mill). The Heckscher-Ohlin theorem was that national comparative advantages in international trade would be determined by relative factor or resource abundance (Corden, 1965). Ritter argued that economic development was directly linked to easily accessible natural resources. However, La Blache argued that Natural Resources were *not determinants of development, but rather elements that would allow economic development to take place*. All of this was of course linked to the notion that natural resources, and nature, were there to be conquered by mankind for his and her benefit (Lewis, 1960; Sörlin, 1991), a reasoning that lead to an over-exploitation of resources in many parts of the world and ecological crisis at global scale. Such over-exploitation can turn an earlier advantage into a later disadvantage, as in many former fisheries dependent rural communities. On the other hand, McClelland (1961) cites Toynbee (1947) who argued that "*it is the challenge of the environment*" which is responsible for development of certain groups/areas, that is, for him, it was the stimulus that may rise from hard regions, from new soil to exploit, from living in a frontier position but also social conditions. Recently, Johansson (1993, p.133), discusses the importance of the local characteristics (especially what he calls 'trapped resources' and Dawe and Bryden (1996) called 'immobile resources') including natural resources, for a region's specialisation and comparative advantage.

Given that **natural resources** are important for economic development, the recent literature raises questions about how important they are; why their existence does not necessarily mean economic advantages for a region; and how the content and use of such resources is being changed in innovative and creative ways which may link with competitive advantage[12]. Our general hypothesis is that the dependence of region's economy on natural resources varies based on each region's specialisation, but also on the own region's capacity to finding new forms of exploiting these resources.

Human resources are also considered as necessary factors in economic performance, although again not sufficient to guarantee success. Human resources possess both quantitative and qualitative characteristics that contribute to growth generation and economic performance, and they are usually referred in literature through their basic attributes, namely: Demographic structures and evolution; Labour force characteristics; and Human capital reflected in knowledge and skills embodied in the population and labour force.

Population growth in rural areas is considered an indicator of local dynamism and it is often related to economic performance. Population dynamics in many areas can be a cause (Boserup, 1965) or a result (consequence) of economic performance (Cawley, 1994)

Labour availability and skilled labour is considered a comparative advantage to rural area with a decisive influence very often on general economic performance. On the opposite, lack of skilled labour is often an impediment to investment undertaken and to economic performance. Highly qualified labour (including entrepreneurial capacity) influences production and innovation processes (Niehaus & Price, 1990; Nam, Nerb & Russ, 1990). So human resources are directly related to the economic performance of an area.

The consensus among economic geographers is that the quantity and quality of regional **infrastructure** has a considerable impact on the economic performance of a region, and probably one of the most important location factors for business[13]. Studies of the impact of infrastructure on regional development generally conclude that the most important aspects of infrastructure for the location decision of entrepreneurs are accessibility (transport infrastructure), the supply of developed business districts and other business related infrastructure. The IFO institute estimates that infrastructure determines about 35% of the competitive position of a region. Dividing infrastructure in different sections, it is suggested that transport, telecommunication and energy-related infrastructure account for about 15% of the regions competitiveness, followed by education and R&D infrastructure with 8%, and cultural and recreational infrastructure accounting for 7%[14]. A study by the PROGNOS institute[15] stresses that the relevance of infrastructure differs regionally, given that different industries have specific demand for infrastructure and that the sectoral mix of each region is different. Splitting up the economy in 32 sectors, the study shows that energy related infrastructure is twice as important for primary industries than it is for capital goods industries. In the latter, R&D related infrastructure is of greater importance. Concerning transport and telecommunication infrastructure, little variation was found in the relevance for different industries. A general result of the study was that infrastructure as a whole has a greater importance for the competitiveness of chemical, iron and steel industries than for consumer, capital and primary industries. Infrastructure has least importance for the competitiveness of clothing industries. On the whole, the impact of infrastructure on the regional competitiveness should not be overestimated. In contrast with the IFO study, the PROGNOS study concludes that the share of infrastructure as a determinant for the competitive position of a region is about 12%, which is equal to factors like wage level or taxes/subsidies.

A study by the Federal Research Centre of Regional Planning in Germany (BfLR) concludes that transport infrastructure is the most crucial aspect of infrastructure for regional development, followed by sewage treatment and waste disposal, R&D and qualified personnel. In contrast, consumer-oriented infrastructure was attributed only little relevance[16]. In the DORA project, examination of the factor infrastructure will focus on the public (including semi-public), material aspect of infrastructure. In particular, we will analyse the significance of transport infrastructure, business-oriented infrastructure, consumer-oriented infrastructure, and tourism-related infrastructure. In addition, we think it is important to consider the impact of (regional) policy on the provision of infrastructure. In this there is a hypothesised link with the less tangible factor Institutional Performance[17].

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[12] One example is the traditional forestry regions of northern Sweden where the expectation might be that forest resources dominate. However, the land resources have been used in more innovative ways, such as focusing on tourism by exploiting the climate and the landscapes for skiing. Bryden (1996) also argues the importance of new and often 'non-material' or less tangible resources for differential rents, and hence comparative advantages.

[13] See SCHÄTZL 1992, p. 33 ff.;

[14] IFO 1990, quoted in DIW 1994

[15] PROGNOS 1990, quoted in DIW 1994

[16] BFLR 1991, quoted in DIW 1994

[17] There is also a potential link with networks – the New Economic Geography literature stresses the interplay of transport costs and external economies linked with clustering in determining competitive position of rural and urban places (Krugman, 1993; Kilkenny, 1993,1998,1999)

The general hypothesis is that a sufficient and growth-stimulating regional and interregional infrastructure, which fits regional needs and is of good quality, aids local economic development through a general reduction of costs, an increase of the potential for future development and the improvement of the quality of life in the region.

In models of economic growth, **investment** plays a key role (e.g., Harrod, 1948; Domar, 1957). In more refined models Investment also embodies technological change. In DORA, the factor 'Investment' subsumes issues of capital availability and the capital stock resulting from past investment. The stock may both be an indicator of past regional growth determined by the savings potential and commercial attractiveness and a clue to the origin, structure and function of the investments which can indicate the causes for differential regional development. The literature considers restricted access to capital especially for new enterprises as a crucial bottleneck for endogenous growth of a region. According to Hill and Munday (1992) foreign direct investment (FDI) is more sensitive to location factors than other investments, and may therefore result in a greater efficiency of incentives. On the other hand, a high level of 'domestic' regional investments can be a sign of self-sustained growth and entrepreneurial capability in a region. In general, a high rate of external investment will mean a greater disparity between GDP and GNP at regional level, with net regional factor incomes being higher where resources and capital are locally owned than when they are not, *ceteris paribus*. On the other hand, external investment may bring new innovations and higher labour productivity as well as new markets. The outcomes of these opposing influences depend on a number of factors which cannot be assumed in advance.

There is a link between the availability of capital, and the (intangible) factor "markets", where under 'capital markets' the functioning of markets for investment capital is examined. Another link exists with the (tangible) factor "Economic structure and organisation" where the current industrial structure as the outcome of past investment is subject to a more detailed investigation.

The general hypothesis is that a higher rate of investments in relation to gross value added can induce/stabilise regional economic growth with different effects on the labour market. Furthermore, sufficient access to investment capital from banks, funds, venture capital firms or 'business angels' can assist local economic development through providing the essential precondition for new firms and business start-ups[18].

Economic structures and organization is also an important factor for economic performance. It focuses mainly on the way economic activities, production processes and enterprises are organized and how they interact. Economic structures and organization influences employment and self-employment opportunities and constraints for the local population, the adaptability of the local economy, clustering and cooperation between enterprises, external economies of scale and scope, the strength of multiplier impacts, and patterns of reinvestment of profits.

Enterprise structures and organization also provides significant information on the structures and hence performance of markets of goods and services in the area. Moreover the aspects of enterprise organization (oligopolistic/ monopolistic conditions) coincide with the corresponding part of markets of goods and services performance, since local enterprises form the supply side of these markets.

In the mainstream empirical analysis economic structures and organization are approached by the following components (variables):

(i) the structure and evolution of employment by sectors and branches (clusters) of economic activities
(ii) the mix of branches mainly in manufacturing and in services and the resulting diversification / specialization and intersectoral relationships (linkages) in the local economy.
(iii) the structure and evolution of enterprises (size, branches – clusters, origin, ownership, degree of integration, local, national, international markets)
(iv) the social formation of production

The general hypothesis is that different economic structures and organization of economic activities and enterprises in an area alter employment opportunities and dynamics for the local population, stimulating different job creation and job destruction processes affecting overall employment growth and differential economic performance.

Less tangible factors: Discussion

Less tangible variables refer mainly to informal relations and activities. The DORA project aims to investigate 'the capability of local people to stimulate economic performance in their area'. This capability should be largely attributable to less tangible variables, which act as the 'invisible hand' in differential economic performance. Less tangible variables are primarily, but not exclusively based on qualitative data.

Market Performance concerns both factors of production (labour, land and capital) and products (goods and services). The basic assumption in this analysis is that inefficiencies in the market performance ("market failures") tend to increase cost of production, affect the area's competitiveness and influence negatively economic performance and growth. Market inefficiencies also constrain the efficient allocation of factors of production in the production process and may result to higher costs or lower levels of production and generally influence negatively economic performance.

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[18] For the impact of venture capital on regional development see FLORIDA&KENNEY 1986

Market inefficiencies are closely linked with economic structures and organisation, and with public regulation and intervention (even when intended to correct market failures) may result from:

i. Institutional interventions in the markets (regulations / restrictive laws, planning mechanisms, taxation etc)
ii. Structural rigidities in the supply of factors of production (type of ownership, low mobility, fragmentation, monopolistic, oligopolistic situations
iii. Lack of information in the market
iv. Geographical dispersion of producers and consumers
v. Low accessibility of markets that might result to higher cost of access for factors of production and for goods and services

The **labour market**, as a social institution in which labour contracts are taking place, performs two main functions. The first is the allocation of labour in different activities (allocative function) and the second is the provision of the means of reproduction to the labour power (reproductive function). One problem in spatially bounded research on the labour market is that study areas do not consist of a single (and homogeneous) labour market, but rather a set of fragmented, differentiated and overlapping labour markets, which interact in a number of ways. Functional labour market boundaries, although important for understanding certain aspects of the labour market performance (commuting, geographical mobility of labour, hiring procedures and labour market policies) are not easy to be determined, and normally do not coincide with administrative boundaries.

Inefficiencies in labour market performance are revealed either through its inefficient allocative functioning or through the insufficient reproductive functioning.[19] Inefficiencies in labour market are mainly reflected in the presence of unemployment in the area, in the amount of job vacancies in the area, the differences in hiring - firing rates and the extent of mismatch between skills demanded by the employers and supplied by the labour force (Walsh, McGrill and Pearson 1982; Pearson and Walsh 1983). The analysis of each factor reveals important dimensions of the *inefficient performance of the labour market. Labour market performance is linked in the literature to the institutional and policy setting (regulations, norms, contractual arrangements, employment services structures etc), labour mobility (geographical, occupational, among branches of economic activities) and related costs (transaction costs, commuting costs etc), and wage rate structures (flexibility, differentiations).*

Natural resources (land, forests, waters, seashore, mineral resources) enter the production process in the traditional resource-based economic activities (farming, forestry, fishing, hunting, mining, resource-based processing industries) of the area, in the location needs of enterprises, and in housing needs of population. At the same time they form the wide variety of public goods available in rural areas (environment, bio-diversity, historical sites, culture etc) which are increasingly important for rural economies and for a wide range of urban 'users' of rural space. Because of their multiple-purpose uses, they are highly regulated through land use planning and environmental legislation and practice. The exploitation of natural resources (forests, agricultural land, mineral, water etc) is also subject to a plethora of regulations. In addition to this regulation, the ownership of natural resources may lead to monopolistic or oligoplolistic control and market rigidities which restrict access by potential users. The state itself may be an important owner of natural resources and exercise more, or less, centralised control over access and use. Nevertheless, this regulation process may help to create "new assets" in rural areas and it is important to understand if these "new assets" are perceived by local population and they are commercialized.

Land market failures can be identified by objective measures of market performances (e.g. land prices, excess demand for housing in the area) or through subjective assessment of land market "problems" by local enterprises.

Capital market performance can be approached through its main dimensions: **capital supply mechanisms** (supply rigidities) and **local entrepreneurs' accessibility** to capital funding. Both can be objectively or subjectively assessed (local enterprise perception).

The functioning of **markets of goods and services** links with the tangible factors *Economic structures and Organisation, and Quality of life.* In addition, there are problems of accessibility to markets of goods and services due to geographical dispersion of producers and consumers in rural areas and spatial characteristics and dynamics of markets of goods and services in rural areas.

'Institutions' is likely to be a critical factor determining local economic performance. And in DORA it refers to public sector institutions, specifically to states, government and governance in the local arena. The context for this is devolution of state power and responsibility within the framework of the EU. It is seeking to get at the ways in which activities of different levels and layers of government facilitate or hinder local economic development, especially, but not only, in relation to the private sector and community initiatives. The basic theory is that by bringing government closer to the people it can be made more responsive and effective. But we recognise that this is not a necessary outcome - power could simply become concentrated in a local anti-development elite, for example, and effectiveness may depend on 'voice' which is not guaranteed by devolution[20]. It is, nevertheless our main working hypothesis.

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[19] In mainstream neoclassical thought it is argued that the labour market performs more effectively the allocative function, while the reproduction of the labour power is mainly the object of different social institutions (family, social security systems). Based on that they argue that unemployment is high because of higher (than market) wages and they propose the deregulation of the minimum wage rates, in order to create employment, ignoring the reproduction needs of the labour power.

We can think of the formal and informal structures of rules and practices which are present in any society as being a critical element of the concept of institutions. In economics, the social institutions which were usually considered important for economic performance were governments, banks, land tenure, inheritance law, and contracts. For the most part institutions were largely taken for granted by modern economists - they were simply assumed to facilitate rather than block economic progress[21]. The main exception concerns so-called 'institutional economics', mainly associated with Commons (1931), Mitchell (1952) and Veblen (1898, 1904). Veblen in particular was concerned with the origin and development of economic institutions which he roughly viewed as habits of thought and conventional behaviour, and hence closely linked with notions of culture. We challenge the assumption that institutions necessarily facilitate good economic performance, and if they do, that they do so equally in different places. We also focus on public sector institutions because other institutions are covered by other less tangible factors; because the public sector has had a significant role in rural development in the post-war period, because in many cases public sector employment accounts for 30-40% of total employment, and because ideas about the role of government are also changing. We also note that Putnam (1993) laid considerable stress on the performance of regional governments in Italy in his analysis of the role of social capital in explaining long term divergences in economic performance within Italy.

One important issue here is likely to be the contiguity or otherwise of the boundaries of public institutions. Other things being equal, contiguity makes for easier joint working between institutions.

Networks form a key aspect of civil society, defined very simply as the set of social practices outside the forces of production including not only community groups and NGO's, but also relations between family members and kinship ties (McIlwaine, 1998). The now widely discussed concept of social capital, which comprises the features of social organisation, such as networks, norms and trust that facilitate co-ordination and co-operation for mutual benefit is linked with the concept of civil society (Putnam, 1993b). Essentially, social capital enhances the benefits of investment in physical and human capital and is created from the horizontal networks and relations between individuals, groups and organisations in civil society. As the strength of civil society increases, more social capital is formed; equally, as levels of social capital rise, civil society becomes stronger.

A network is generally defined as a specific type of relation linking a defined set of persons, objects or events (Knoke & Kulinsky, 1982). More pragmatically, networks can mean both social relationships among individuals and interactions among organisations, although in rural areas the overlap of professional ties with personal and social ties makes the interaction pattern much more complex. Various typologies of networks have been identified in the literature[22], particularly for the enterprise sector[23]. Indeed, similar typologies could also be identified for the social[24] and political[25] sectors. However, in DORA we first distinguish between those networks which are formal, and those that are more suitably classified as informal. The difference between formal and informal networks hinges on the presence or absence of a legally binding contract. Informal networks are composed of a wide variety of relationships individuals have with kin, friends, acquaintances and neighbours. Importantly, they tend to have diverse objectives which are open to modification and are usually characterised by familiarity, long term occurrence and interaction which occurs within a multiplicity of contexts[26]. Neither formal nor informal networks are limited to face to face interaction, although spatial proximity may facilitate their establishment and maintenance. Moreover, neither type of network is exclusive to the enterprise sector, but may involve any combination of the social, enterprise and political sectors to varying degrees and with varying objectives.

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[20] As argued by Albert Hirschman in Exit Voice and Loyalty (Harvard UP:1970). Hirschman's argument points us to the issue of how people are or are not given the means of expressing their concerns and views (i.e. given 'voice') within organisations.

[21] Not so in Adam Smith, however: Smith recognised the incentive effects of different kinds of organisational and institutional arrangement, and regarded an appropriate and effective institutional framework as essential to the functioning of the market. Wealth of Nations, 1776.

[22] See for example Szarka (1989), Johannison (1987).

[23] The Enterprise sector is made up of all firms, whether large corporations or Small and Medium sized Enterprises (SME's).

[24] The social sector relates to the civic community, and can be viewed either in terms of individuals or community organisations and groups.

[25] For the purposes of this discussion the political sector is deemed to comprise of local authorities, government bodies and NGO's, including for example Chambers of Commerce and Business Links.

[26] See for example Reimer (1997)

It is also important to consider the difference between internal and external networks. Internal networks are those that take place between any group of individuals within the local community (however defined). External networks, on the other hand, relate to those involving a process of information and exchange between members of the local community and the outside world, whether it be the region, country or the international community. This is very important in relation to the paradox of globalisation: the increasing importance of the 'local' in the face of evolving globalisation of economy and society. Of importance also is the concept of embeddedness (Granovetter, 1985) whereby economic behaviour can be seen to be closely embedded in networks of interpersonal relations. Essentially, it is in social relationships that the trust and confidence for economic transactions originates. In local societies, such relationships may be formed through family and kinship ties, whereas in an extended context it is organisation, networks and institutions that embeds the economy.

Various statements about the importance of networks are made in the literature. For example, social capital embedded in norms and networks of civic engagement is seen to be a pre-condition for economic development. Similarly, civil society is described as a capillary or womb that actively supplies life-giving elements to the development process. Perhaps more directly, it is argued that larger networks will provide access to new jobs, new business opportunities and new markets (Granovetter, 1974). Further statements are provided in relation to networks and the growth and development of firms,[27] which in turn have implications for territorial economic development.

In DORA we will assess networks within the enterprise sector (i.e. between firms), at both formal and informal levels, between the enterprise and political sectors (i.e. between firms and local or national authorities and NGO's.), between the enterprise and social sectors, within the political sector, within the social sector, and between the social and political sectors through, for example, public participation in the planning process, again perhaps stemming from club and society membership.

The basic hypothesis is that strong networking activities will aid local economic performance through increased information and knowledge sharing between individuals, enterprises, and organisations. However, this does not take account of the size of the networks, the efficiency of the networks in promoting economic performance or the spatial proximity of the network and its resulting consequences.

Community is closely linked to the concept of ***culture*** which was our initial attempt to approach the issues involved. Whereas states are governed by laws administered through bureaucracies, communities consist of people who share and exchange meanings and rules, in other words, culture (which is manifested in shared customs). States punish transgressors, whereas communities usually can only exclude them. On a continuum of formality, most communities are highly informal, even ideal.[28] But they do represent a type of social practice held in common; and for this reason we approach the meanings inherent in culture through their social expression as community.

'Community' (with 'culture' understood to be its glue) describes the important shared cultural resources that people draw on (consciously and unconsciously). By naming this factor ***community***, we aim to anchor our enquiry in the more concrete notion of social life; hence we are focusing on locally important ideas and practices. However, in the overall comparison of variables which influence DEP, the community factor is recognised to be the *least tangible*. The way in which we intend to investigate community initially is through the systematic exploration of locally meaningful ***stories*** of economic performance. For narrative is the means whereby culture is expressed, just as bureaucracy relies on quantified analysis and written rules. Because of the nature of this factor, our enquiry has to be sensitive to locally shared notions and their relationship with economic success. We cannot predetermine whether certain local ideas have a positive or negative impact on DEP.

The DORA project is we believe a first attempt to establish the relevance of community (and culture) to DEP in rural areas. The factor subsumes the following conceptual components or variables:

- Forms of community and identity
- Religion
- Local traditions and history
- Values, beliefs & attitudes

It is our hypothesis that constructions of community have a strong (yet less tangible) impact on local economic performance. It is suggested here that these four variables act as a short hand to describe local ideas of community and the cultural resources sustaining them. In order to investigate the relationship of these to DEP, we propose *collecting stories* about the construction of community which are based on local memories and, where possible, to *make observations* about community in action.

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[27] See for example Curran and Blackburn (1994)

[28] One well-known example of the strength of 'ideas of community' would be Anderson, B. (1983) "Imagined communities: reflections on the origin and spread of nationalism"

Locally meaningful stories of economic performance will be an indicator of the value and understanding of that performance within the community, i.e. the degree to which it is shared and valued positively. These stories about DEP can be collected by researching the listed variables. We will have to ask what forms of local traditions, identities and organised religion are present and whether their existence has a harmonious or divisive effect on the community as a whole. We are interested in the *prevailing (or innovative) labels* under which communities are grouped and to what degree these are in- or exclusive, i.e. how they are used. In particular, our focus must concentrate on all areas of economic activity, i.e. where production, exchange and consumption take place, and examine closely that intersection between culture and economics which might be caught by the variables listed above. One area which needs our full attention is the commodification of culture. We are especially interested in whether and how traditions and cultural artefacts are being capitalised on internally and how they are utilised, creatively or otherwise, with positive effects for local economic performance.

Quality of life (QOL) is one of the five less tangible factors that **indirectly** influence the degree of differential economic performance between our study areas. *QOL has a positive and a negative dimension.* On one hand, QOL in rural areas is easily associated with good air quality, closeness to nature and safety. Natural and cultural amenities do not constitute only people's symbols of their living place but also part of their local identity that might also be a location factor for business. The same could be expected from the existence of local networks, which are able to multiply the people's capacity of survival in rural areas. On the other hand, rural areas have also their disadvantages or push effects. It is easy to understand that the capacity of making choices is much more limited in small communities than in large urban centres, assuming that people have the same capabilities. The lack of life quality is also limited on the supply side, such as access to and number of available schools, medical care, jobs and entertainment. For young people, for instance, "the strong sense of belonging" is perhaps less important than the strong "social control" (or surveillance) they are targeted living in small communities. *QOL has an individual or subjective*[29] *as well as a collective or objective dimension*[30]. QOL is thus being analysed from the perspective of the individual, such as entrepreneurs and members of the general population. The focus will be on living standards and safety; environment quality and recreation and multiculturality.

The general hypothesis is that a high QOL in rural areas has a pull effect on individuals and entrepreneurs and indirectly impact on region's economic performance. High QOL is associated with individual's choice of residence (counter-urbanisation) and investment in rural areas (location factor for business).

Conclusions

Whether or not the State will be able and willing to support the economic development of rural areas in future, it is inevitably the case in market based economies that it will be local actors - individuals, entrepreneurs, collective organisations, officials and agencies – who will determine their relative success in the context of an increasingly globalised economy. Although the objective or tangible 'resources' with which they have to work will certainly matter in this endeavour, it is our view in the DORA team that the less tangible factors of market performance, institutional performance, networks, community and culture, and quality of life which could be decisive. This, at any rate, is our overarching hypothesis. The paper has given the background to the research on 'differential performance' and described the inter-disciplinary and comparative approach which we are taking to the problem. It has also argued the case for research of this kind in the changing context in which rural areas are having to survive and develop. We are aware of efforts to start comparable research in Canada and Australia, and we hope that this will extend to other countries in order to gain new insights into both the nature of the rural development 'problem' and its potential solutions.

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[29] *Subjective indicators* are generally defined as being based on direct reports from individuals about their own perceptions and feelings. To obtain a direct measure of the quality of life of the people concerned, a questionnaire survey is proposed" (Dale, 1980). *Subjective indicators* tend to describe the ways people perceive and evaluate conditions around them" (Pacione, 1982).

[30] "*Objective indicators* are generally defined as counts of various types of phenomena, such as levels of income and residential densities. They are most often regarded as quantitative "facts" selected from census data and other accessible official registers" (Dale, 1980). "*Objective indicators* are hard measures describing the environments within which people live and work. These can deal with issues such as health care provision, crime, education, leisure facilities and housing" (Pacione, 1982).

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Additional Comments:

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Questions & Answers

Anyway, face to face kinds of places. In the communities where I work, the kinds of stories of economic performance that tend to be told are stories that relate to another kind of economy, other than the one that is emerging. They tend to be the stories of, I work in a coastal community in Atlantic Canada. They tend to be stories of great fishing exploits of people in the past who have gone out and made huge amounts of money in the fishery that is now collapsed. Those stories tend to have a kind of mythical life that lives on into the new economy. They seem to have tremendous power to influence the up-coming generation, as well as the people who are established and middle aged and operating in a working community. I'm very interested in your research, whether you're beginning to see evidence of new kinds of stories, of new kinds of narratives of economic performance in the rural communities that you're studying. Perhaps the previous speaker who's had experience in 30 odd communities in Canada could speak to that too. In the research that I'm doing the old stories retain tremendous power and I think those stories have within them (I'm an educational researcher) tremendous power to inhibit young people's ability to access higher education, formal education, particularly young men.

John Bryden – it's an interesting point – my idea would be that certainly that is true in many rural communities that I'm aware of as well. On the other hand, you are seeing new stories – I think you're seeing new concern by parents. In Rural Greece, you have heroic stories, but at the same time, rural parents are extremely keen to see their kids go to university, and make a lot of sacrifices to actually do that, and that has been true in our peripheral areas of Scotland. For many years, people have recognized that it is very important for their children to go and learn new skills. Although that particular set of narratives was about getting out in many cases and staying out in many cases. I think you are beginning new narratives now which are not necessarily unconnected with the old narratives, but they're about how can we use these old narratives, use our past as it were to start to bring new activities to the area and I can recall fishing towns where some of the old fishermen are actually involved in telling stories to visitors. They're actually engaged in a new kind of economic activity through local historical societies, or local museums. I think you are finding new narratives and particularly, and maybe this is one of the features of the more successful rural economies are the way the new narratives are emerging in a connected way.

Thank you once again John.

KEYNOTE ADDRESS
Every Other Day

Tom Tiller, University of Tromsoe, Norway

In this talk, I argue that schools need to be reoriented and restructured so that what is taught and learned, and the way in which it is taught and learned, are better integrated with young people's real world experiences. Many indicators strongly suggest that the meaningful aspects of school have been lost in the encounter with modem times. The free spirit that characterizes youth culture conflicts with the ways schools are conceptualized and operated. School has fallen behind the times and behind new developments. It is the school that must change.

"Every other day" is a metaphor taken from my own schooldays in north Norway, where we attended school only on alternate days. The "other" day, that is, the day we were off from school, was far more important for our lives after graduation than we then realized. That day off meant that even our school, which seemed only minimally relevant, was comparatively good. Today, however, school totally dominates the life of our children. This places great demands on the school to provide students with fulfilling life experiences, and it requires new organizational structures. We're approaching an either-or situation: either give back to youth that "other" day, that day off or school will lose its meaning and legitimacy.

When We Lose the "Other" Day

Not long ago I got a phone call from a junior high school teacher and mother of four. She told me that she "lost" her students over the course of the school year, by which she meant that she lost contact with them, and that they lost their engagement with school. She wasn't talking about isolated cases, but about a growing trend, and it was that which had made her very disheartened and discouraged. As she explained, "Me paradox is that I am considered a capable teacher by my students and their parents. What's happening? It can't be school that's doing this. Is it just the times we live in? What do you think? It usually happens a few months into the eighth grade. They just slip between my fingers, and I never get them back."

It is not just this teacher who has noticed that something dramatic is happening in the schools, especially in junior high. New curricula on shiny paper presented with ministerial authority won't solve this problem. The problems of school are so fundamental that reworking old curricula won't make a big enough difference. Besides, curricula are perhaps not as important as we think, especially if we don't even have much faith in them. After all, consider the Danes, who arguably have one of the world's best elementary school systems, which they achieved without a national curriculum to guide them.

School isn't keeping step with the times, we could say. Something completely new is required to keep up with new developments. Schools have searched for inspiration in every nook and cranny from New York to New Zealand. School administrators have heard famous educational practitioners, theorists and researchers at countless conferences and courses, where they have sat day in and day out listening, wondering, and admiring. School has in truth bounced from guru to guru, like a giant kangaroo hopping from one idea to the next (Tiller, 1990). This bouncing has sapped schools of their strength and in the middle of all this, doubts have spread, unnoticed and unarticulated. It's a dangerous kind of doubt, headed towards surrender.

Maybe we have been inundated with too many new ideas from too many inventive souls. Maybe our fickle embrace of all that's new has made our teachers and administrators dejected and alienated. Perhaps there's a subversive nature to all this. We teachers listen, we eat our lunch together, we discuss things a bit, and then we head for home to our complicated everyday lives. Maybe we have forgotten how to dunk for ourselves and trust our own ideas. Maybe there are solutions-soiutions we can find in our own schools and our own school boards.

A general problem with schools today seems to be that young people have lost any kind of involvement in real life work experiences. School has closed many of the doors that used to be open to the world of work and culture. There used to be more time to share activities with adults. Not only was the school day shorter, but school was also cancelled when hectic work cycles required it. In Norway we used to have a "potato vacation," which meant time off from school, although it was anything but a holiday. Potato vacation was tantamount to hard labor and aching backs, when the potatoes had to be harvested and stored. It was unquestioned then that children had to help out on the farm or with the fishing when it was needed. Today, however, school robs our children of their time, in particular of the time to participate in work with their parents and other adults. A potato vacation would be unthinkable today. The old patterns of work life have changed dramatically. There is no more room for children in the workplace, many would say. Therefore, schools have to compensate and give young people not just a place to learn but also a place to be.

Schools can't accomplish all that we ask of them today. The situation is decidedly critical. Maybe we should look back in our own lives to see if there are possibilities and solutions there that we haven't considered. Perhaps we can get some inspiration from the old organizational pattern the one that alternated between the classroom and the life out of earshot of the school bell. Of course we can't recreate the past. Nostalgia will lead us down the wrong track, but inspiration from the past may help us lay new tracks to the future.

In my first years at school, we had classes only every other day. There was just one classroom and one teacher, with lower grades working together and upper grades together. On the "other day" school was out. But when we were "off" from school, we were "on" to something else. The other day was full of duties to be discharged, duties related to making a living, to housekeeping, to farm work, and fishing work. The other day was exciting and at the heart of life. Importantly, its significance also permeated our days back at school.

We tried to forget the other day when we were at school, but it would sneak back into our minds. It was not easy sitting and drawing hippopotami at our desks while watching otters playing at the shore. Concentrating on reflexive pronouns was somehow not as compelling when, only a few hundred meters from the school window, local fishermen waited for a break in the waves to bring their boats up onto the rocky white shores.

On the Path to Educational Tyranny

In those days, our schoolwork paled beside experiences from our other day. Now it's the opposite. School dominates our children's lives, even long after the routine "How was your school day, dear?" is over. School not only consumes the days of the students but also preoccupies the lives of the parents. They edit school reports, they help count the stars, they take joy in school victories and worry about defeats. A quiet but insistent thought arises: should we allow this tyranny of schooling to continue? Should we accept that despite all the good intentions listed in polished curricular handbooks, life experience and contact with Larger society have disappeared from our children's lives?

Have we been so eager to make schools efficient, effective, and accountable that we have forgotten that for children, school is their workplace for thirteen long years? We used to keep schools in their place, back when we had that "other" day, that day off. We accepted the significant role of schools and the importance of subject-matter leaning. Families and the local community, however, took care of many fundamentals: safety, pleasure, duties, and rights-even basic manners, some would say. The mandate of the schools was unambiguous: teach children basic knowledge. Now schools must be three different things: a place to learn, a place to be, and a channeling mechanism for the speculative, commercialized forces in society.

These are enormous tasks and they create problems at all levels of the educational system. Curricula simply repeat old-fashioned values in light, modem versions. Modem curricula are like the slender, sleek bodies we see in advertisements, like the pithy slogans we read on billboards: superficially appealing but lacking substance. Our curricula target a "clean" classroom: we aim for organization, standardization, and coordination. We snub local culture and tam our focus towards Europe and the world, towards economic growth through society's ability to mobilize creativity and knowledge.

At the center of all our curriculum reform efforts are the children. Curricula talk about learning for life. Pupils learn not only for life, but also for their lives. The logic, of instrumentalism takes hold in the role of the student in the young person. No one articulates it clearly but the message is nonetheless ambiguous: if you want to be somebody in this world, you can't just learn a lot. You also have to win a lot. Do your best and win, says the curriculum. "Win and beat the others" is the tacit message. Is it true that capable teachers are "losing" their students, as was asserted by the teacher I mentioned at the beginning? Are schools wearing their students out? Will "The Great Curricular Reform" have an unexpected, undesired side effect in the form of talent loss instead of maximal utilization of the collective talents of our young people? In the United States we see a growing tendency for parents to take their children out of school for home schooling.. Today about two million children are home-schooled in the U.S. (Dagbladet, 4-1-96). Some educational researchers in my country predict that current school reforms in Norway will lead more parents to consider home schooling there. The tendencies are clear. Dissatisfaction with public schooling is sharply rising. Christian Beek asserts that that compulsory schooling for 6-year-olds will result in increased school fatigue rather than better learning (Beek, 1996). Should we care about this critique or just keep quiet? Should we start today to try to create dynamic new alternatives?

The Learning Encounter: Bringing life to school and school to life

In trying to understand what the "other" day contributed to learning and development, it is important to remember the basic requirements of good schooling. A fundamental condition for meaningful and enduring learning to take place at school is that the life experiences of young people are integrated with what is taught and learned in the classroom. This is what I call the "learning encounter" (Tiller, 1999), and it's a prerequisite for reflective teaching and the ongoing evolution of schools as organic institutions. Good schooling always takes into consideration the experiences children bring with them to the classroom. A good teacher must know two things very well: the subject and the students. Today people seem to be focused disproportionately on subject matter. Children's thoughts, feelings, and opinions about life events aren't necessarily correct but nonetheless, they are a vital part of an organized learning process. If the learning encounter is neglected, then we can train students but we close the door on true, enduring learning. Training is something children forget very quickly. Training and instrumentalism are close relatives. Good schools of the future can not have training as their fundamental principle. True learning requires that students actively take responsibility for their own and others' development. When students do that, they bring themselves and their experiences to their encounter with organized knowledge. This kind of learning encounter is fundamental for learning at any age. We can see it when it happens--it's the spark in a six-year old's face when the match between life and knowledge is right. We can see in high school when it happens, and we recognize the glow in college students when their life experiences mesh with subject matter. The learning encounter literally and figuratively brings knowledge to life.

Establishing and developing learning encounters is a demanding undertaking. It requires that teachers see students as people, and that they care about what they see. It's about a great deal more than simple technique. It requires that teachers make immediate connections between the subject matter and the students' reactions and attitudes that find expression in the classroom. The ephemeral moment has to be plugged into the long-term. Unexpected pauses must sometimes be taken and unplanned breaks in the learning process must be allowed. Teaching cannot be steered like a jet: it must be allowed to move more like a butterfly fluttering through the air. Or in musical terms, good teachers can't just plod through the standard repertoire; they must be able to improvise. The mission of the school is to build knowledge up from where the student starts. Learning takes courage, and it's the teacher's job to give the students challenges, motivation, and the strengths to learn. Developing learning encounters requires confidence in children's ability to take responsibility for their own learning. It also requires a certain amount of freedom.

The encounter between school knowledge and everyday experience is decisive not just for student attitudes toward school, but also for how children view themselves as people. When students don't understand what schools wants them to understand, it influences their self-concept. When a student doesn't "get" physics, the student also learns that "I am no good" relative to the expectations of the school. When children experience this over and over again, in subject after subject they rapidly develop a negative self-image. It's dangerous not only in the short-term but also in the long-term for the future of a democratic society. If the school day is void of moments that create identity and meaning, the benefits of schooling won't last long. Students who fail in one or more subjects will naturally enough try to avoid these subjects in the future to protect themselves from threatening encounters with knowledge. We all avoid situations where we feel unsuccessful. In this manner we prevent the positive parts of our self-image, laboriously built up over our lifetime, from crumbling. Thus, discouraging experiences in the early years at school make us avoid the spotlight and withdraw from the lifelong learning process.

Perhaps negative school experiences help explain why so few parents become engaged in school activities. It is difficult for some parents to re-encounter the classroom after so many negative moments there, and it's even more painful to realize as an adult that one's distance from the smart kids at school has grown greater over the years; the disparity has been magnified. Thus, negative learning experiences can not only explain student weariness with school, but also help elucidate motivational problems in adult education. It doesn't t take much for discouraged learners to be wary of theory, theorists, and, unfortunately, teachers. Thus, a good school today also creates good, involved parents and motivated adult learners tomorrow. Teachers shouldn't ignore this fact, even if it requires that they look rather far into the future.

The Neglected Perspective

An article in the north-Norwegian newspaper Nordlys. (7-12-95) stated that in Havoysund, a village in Finnmark, children typically lose a week or two of school each year so that they can help with the fishing or with baiting fishing lines. In Havoysund they've made room for what is called "local subject matter" in the curriculum. The "other" day is conceptualized as a subject on a par with all the other school subjects. It's one way to compensate for the loss of the other day and the consequent loss of direct contact with nature and local culture. Havoysund has the right perspective. It isn't about tying young people to a particular place. It is however, about giving them a good grounding from where they can securely choose what they want to do and where they want to live in the future. It's about preventing school from unconsciously and unintentionally pushing children out of rural areas. It's about establishing roots, and it's about setting one's sights on creative, new possibilities and positive scenarios. This view towards the future can find a place in all classrooms and even in the school kitchen, where students in Havoysund could for example, prepare a delicious French or Italian fish supper for parents and local politicians. The exotic meal would be part of the systematic subject-related knowledge of the curriculum and would also represent an effort to learn about finding new niches for improving the processing of raw materials, and for continuing life along the shore. It is a different perspective than cramming about Spanish food customs just because it's the next chapter in the geography textbook.

Large-scale development projects in the 1970s (e.g. The Lofoten Project) placed school-community relations on the agenda. The current work in Havoysund recalls how schools rose to the local challenge twenty years ago. Back then there were the same arguments and reasons and some of the same spirit. Discussions about curricula in many countries have echoed the same approach to the problem. (See, for example, McSwan, 1994; and Sher, 1995.) At the most basic level, our gut feeling says that a good school has something to do with that golden encounter between children's experiences and the codified knowledge and attitudes of the school. This is equally true and important at lower grades as at higher grades. At higher grades the life/school connection win be different but just as central in the learning context.

Local orientation of a curriculum is not synonymous with local obsession. When schools include community activities and work life as a "local subject" or a cultural project its strengthens a child's identity. It is about recognizing oneself at school, as well as being recognized and acknowledged. It's about linking schooling and living. It's about taking root so that you can grow tall and strong and weather life's storms.

The Same Opportunities for All

A new bit of Norwegian school jargon is the expression "common frames of reference," that is, the core content making up some kind of pan-Norwegian experience. The thinking behind this idea is that children should not be forced to deal with a new curriculum if they move to another part of the country. In and of itself, this idea makes sense. But where should these common frames of reference come from? Whose perspective should guide the choice of these frames of reference? Considering the history of Norwegian schools, there is good reason to fear that fishing nets from Havoysund or other rural areas won't be at the top of the list of elements to include in these frames of reference. Back in my school days, I remember a phonics exercise where we had to find a rhyming word for "nok". The book provided "flokk" as a correct example. This made me and the other students in my class scratch our heads in bewilderment, because in our dialect, "nok" rhymed with "flaak," not "flokk." That was long ago, some people say. But if you doubt that this attitude is still alive and well in modern Norway, watch the televised national finals of the student quiz show. Are there just as many questions about plants and animals from remote Havoysund as there are from Ski or Baerum in the south? The decisive question for one of the elimination rounds not too long ago concerned the common blue jay, a bird from southern Norway.

People still talk about schools providing equal opportunities to all. We cannot create equal opportunities in a geographically and culturally diverse country like Norway if we are teaching the same material everywhere. Paradoxically, it is in the differences that we have the greatest potential for equality. Children and adults learn best when examples are drawn from the familiar and known. As a pupil, I made the acquaintance of A, B, C and D who all worked at a factory, a place that most definitely was not part of my known and familiar world. Poor "D" was frequently sick and often had to go home in the middle of the workweek. I often felt sorry for D, even if he was only a letter who worked in a factory. On one of our tests, we had to figure out hours and wages for all of them, which made that test day a kind of "D-day" for me. Another puzzling situation for me was the trolley car that left at 11:43 and reached its destination at 12:08. I didn't believe a thing about this story, even though the teacher claimed it was true. I believed in busses that now and again arrived at the ferry landing and then went no further But nonetheless we had to figure out trolley schedules in Oslo. The problem was that none of us had any experience with factories and trolley cars. The "common frames of reference" that prevailed at that time did not in any way give us all the same chance to succeed first at school and then in a competitive society. If schools slide back into such a system, then some students will slip right over the edge, and pretty words in curriculum plans won't help.

Grounding the curricula in the local context is important no matter what the context. The basic curricular structure can be the same, but the examples should vary according to geography and culture. In some locales, trolley schedules can be actual examples in math problems, but bus or ferry schedules will prove more relevant and engaging elsewhere. Schooling that is based on common frames of references and standardized content will limit the chance for true learning encounters to occur. If the near and known context is utilized only as a means to understand a single "correct" common frame of reference, then we risk alienating young people from their experiences. If the common material includes only token familiar bits, this lack of relevance must be compensated for in some other way, maybe in the form of new methodologies. But methods can never compensate for the absence of known and near frames of reference. Unfortunately, Norwegian schools have a long history of alienating rural students by imposing a centralized view of knowledge and then gratuitously sprinkling in bits of local knowledge like exotic spice. The challenge for teachers is to adapt the standardized materials. The further the standardized materials are from the students' local world, the more adaptation will be necessary. This creates not only inequality for student teaming, but also unequal working conditions for teachers and administrators. The pedagogical challenge grows proportionately with the distance from the core content.

It is admittedly possible that a new standardized curriculum could be constructed with greater wisdom than was exhibited in the past from those who tried to foster enthusiasm for mathematics with the help of A, B, C, and D, who worked at the factory in the city. It is certainly possible to teach textbook writers and train textbook consultants to assess "common" content with a more critical eye. Teachers, too, can choose to give more coverage to crows where textbooks have showcased southern songbirds. Even if some things can be done more wisely and misguided interpretations of equality can be checked, it is, nonetheless, the same old concept simply dusted off To further aggravate things, education today is characterized by challenges that make polishing up the old concept of common content even less advantageous. For example, days and years at school are longer. Motivation drops as students move up in grade level. Many important societal features have changed. Far stronger words than "weariness with school" have been bandied about in debates. The "tyranny of education" is one such term. The school now has strong competitors in modem media and information technology. More and more students hurry home at the end of the school day to "finally have a chance to learn something," as a boy once said to me two hours before the end of the school day. There was no shame or embarrassment in his words or facial expression, either. Society's and school's burdensome demands on young people make it hard on everyone. It's important to ask if this newest phase of thinking about content feeds the tyranny of education and if we can see a growing disparity between the so-called central and peripheral areas of the country.

The Other Day or the Day After?

In the discussion about good teaching and teaming, misunderstandings and misrepresentations arise easily. Reinstating the "other" day in school doesn't mean that the teaching of theory and concepts must be abandoned. Paradoxically enough, a greater theoretical understanding is necessary to make sense of how things in a complex world are connected. But if by theory me means that school should more strongly emphasize detached abstractions, then we're on the wrong track. All citizens, not just teachers and administrators, have a responsibility to insure that school development doesn't head down the wrong track in years ahead. Elementary school should lay the foundation for students to have positive attitudes towards theoretical knowledge and new teaming.

Understanding something is not the same as the ability to repeat or parrot. Students who get the answers right on tests do not necessarily have a greater grasp of the subject area. Supplying the correct answer is not the same as understanding something theoretically. In-depth understanding demands that the teaming encounter occur in the teaming process, that is, that students can recognize their own experiences and thoughts in theoretical reasoning. Students must learn to master abstract language and thinking, but they can do this only by starting with their experiences. This is an important foundation for lifelong learning. Doubtless, there are problems of motivation and legitimacy in schools today, bit we should be wary of assuming that the lack of discipline and the weariness with school seen in today's youth are evidence of individual psychological problems. It's not simply a case that "these kids need a good talking to." A more fruitful approach to understanding the problems of school is to ask if young people really see and understand what teaching and learning is for. Do they see a connection between school and life? Thirteen years of compulsory education means that there's a long wait to see if what they learn is of any use. In addition, large segments of society have become distanced despite the increased flow of information. When we look carefully enough, we can see growing class distinctions between those who utilize information by transforming it into in-depth knowledge and those who only sit and glance at the days news. Even if they listen, they don't understand what the issues really concern. I didn't understand the issues about A, B, C, and D in their factories, and growing numbers of people don't understand the issues facing the As, Bs, Cs, and Ds they see on the nightly news. There always seems to be a new D being talked about who gets rained on and who we feel a bit sorry for. Then we switch to another channel. It used to be that we could look forward to the "other" day. The existence and promise of the other day meant that we managed to sit through our day at school and even calculate enthusiastically what D's wages were at the factory, or marvel when we learned that down south they said "naakk" and therefore it rhymed with "flokk." We took in as much of the common frames of reference as we could. The other day insured that we would have the important fundamentals of learning: safety, play, excitement, creativity, and freedom. What now? Are we heading towards a situation where the school day conquers the other day? Have we missed the boat and now must suffer through the day after?

Towards a new alternate day

What are we to do? We cannot of course let students have every other day off as in my childhood. We have to find a new way to incorporate the benefits of the other day into modem schools. Nonetheless, we can look at the characteristics of the old other day to help us construct a new other day. Our other day experiences outside of school didn't have a name and weren't really remarked upon except to note if we had behaved well or poorly. Either we went to school or we had the day off it was school which "counted." We endlessly heard grown-ups intone: "If you don't do your homework, you'll amount to nothing. You'll never get a decent job if you're not smart at school. Do your homework and listen to your teacher and you'll make a success of yourself."

In reality, however, there was so very much more on the other day. We weren't just out of school, we were immersed in life. The day off gave us rich experiences. That day insured that holistic learning occurred in our lives. We were involved in many informal apprentice-master relationships. We young people were invited into important, legitimate learning positions, even if we were often on the periphery of the activity. The other day was characterized by what we now call situation-based learning. We cooperated as we worked side by side with the adults. There was always some kind of real-world problem that had to be solved, that needed to be reasoned out and discussed together. The other day provided clear space for creativity and excitement. We gained responsibility for increasingly difficult assignments and we were trusted to complete them. Grown-ups had patience with our young hands that didn't always have the right grasp for milking a cow or cleaning a fish. We were trained to be humble and have respect for adults. Through common work it wasn't difficult to show adults respect and place ourselves somewhat to the side where observation and contemplation slowly but surely mixed with tying and failing at first, but later, tying and mastering.

We were indeed free from a school schedule but we were in no way free to do what we wanted. There was always work that had to be done. Every season had its own work. In the winter we had the most free time, except for the usual chores in the barn. The animals had to be fed and the barn cleaned out. We also had to talk with them. I was convinced for many years that the long dialogues I held with my cow were why she always had so much milk. It was undeniably true that the cows didn't kick the milk bucket if we patted and brushed them while we milked. Often there was more chat and patting than milk in the bucket, especially when I tried out new ideas such as the time I decided that the cat and our prize cow should sleep in the same stall, with the cat on the cow's back.

But not all was sunshine and roses on the day off On many mornings I dreaded getting up, especially when the wind howled outside and I knew that we had to go out to sea to pull in the nets so that the catch wouldn't be destroyed. Many times I was afraid out at sea. I knew that my father wouldn't take any unreasonable chances, but I also knew that much was at stake if we didn't go out and that he might play with the limits. But he was very careful when I was with him, so it was largely out of concern for my parents that I insisted that I should go along and asserted that I wasn't the least bit aft-aid. I especially dreaded getting the boat out into the water, because there was no pier or dock, and we had to force our way into the waves. One time something went wrong and the boat crashed back onto the rocks again. The winter was cold and just the thought of it brings back that feeling of the bitter, piercing cold on my cheeks. But that wasn't the worst. The worst was that I had to use big rubber gloves, while the adults had thick felted wool mittens. Using rubber gloves hurt my young dignity, especially when we went ashore and others saw me wearing them. You had the right to mutter strong, many words while wringing the water out of the mittens. Without wool mittens you couldn't really talk tough like that. Once I borrowed some dry woolen mitts, and went down to the shore when no one saw, dipped them in the water, and wrung them out while I practiced some grown-up talk. It was frightfully cold and at that exact moment I was grateful for my waterproof rubber gloves. The other day was not always a carefree dance in the roses, even though of course the carefree days are the most easily recalled.

Judged by today's demands for meaningful content, my school days were pretty hopeless. There was little in school that had anything to do with the world of my buddies and me. Textbooks contained very little that was familiar to me, and not much about north Norway altogether. Facts about Oslo and its environs, about cities and towns abounded. Almost all the brilliant color pictures in the textbooks came from urban, modem industrial areas. The grainy black and white photos captured life in rural, isolated areas. I deduced that the material about north Norwegian conditions just didn't merit much interest. As a child I couldn't articulate this feeling-it was more a gut feeling, not yet put into words. It was as if something didn't quite make sense, didn't quite fit. Life in North Norway was flat and insignificant. Knowledge about "my world" wasn't exciting. Deep inside a little voice told us where it was worthwhile to live in the future, something about what held the greatest values in life and about where you had to move to become someone who counted. Without a doubt the old textbooks whispered, "Move away." To make matters even worse, what little there was about north Norway was often wrong.

Despite the lack of anything familiar in our schoolbooks, when we worked hard, there was a connection with the other day, and life after school. The other day, which could be demanding and exhausting, meant that our day in school sometimes felt like a day off. School became the legitimate free zone from the cold winds on the sea and the frosty air of the barn. At those times it was preferable that the school material was created from completely different experiences and thoughts than those I had on my little north Norwegian island. Of course were also socialized to obey and respect adults on the other day, and we carried these same attitudes into the classroom. We wrote little ditties about school and complained liberally about the injustices of school, but we enjoyed ourselves most of the time.

I almost always looked forward to going to school, even if I didn't always love school itself. My walk to school, a kilometer along a deserted beach, was always a pleasure. On the day after a storm the walk was especially thrilling. There was always something exciting which had washed up on shore. Anything red, green, or gold made me quiver with excitement-this was, of course, before the era of colorful plastic garbage. Storms brought the natural world even nearer-sometimes large fish were washed up on shore by the wind and waves. My motivation to go to school was certainly enhanced by having a shoreline as my school route. I have since understood that one's route to school is perhaps a more important influence than we realize for motivation to attend school. If you dread the getting to school, it naturally colors the whole school experience negatively. When new schools are being planned, thorough consideration should be given to how the children will get to school, and thought should be given to more than just whether it will be free of traffic hazards and bullies.

Now the walk to school isn't so exciting, and the other day has all but disappeared. Schools today, seen in isolation, are much better than my old school, even if students aren't t as happy. Today children set schools on fire. Reports about burned down schools appear all too often. Schools bum, both literally and figuratively. Too many students are unhappy at school. Too many are bullied. Too many learn too little. And even then, school is better now than it used to be. Students learn more relevant things, and learn it in more varied ways. Teachers are better and administrators are much better than before.

Can the problems with schools be traced to the loss of the other day, with its freedom, play, experiences, creativity, and daily demands for participation and proper behavior? Is it at all possible for school in its existing form to find once again the balance between life and school? Can school compensate for the disappearance of the other day? Or must we work in new ways and build new paths to school? I think so. I dunk we must now show daring and try out new concepts.

There are possibilities. We can start out small and invite adults into schools so that they can see that the other day is gone. We could make it a requirement for all school politicians at every governmental level to go to a school at least two days a year-not to inspect them, but to learn and be inspired. It should be proposed as more than a wish that all parents participate actively in a school activity once a year. In such a way they will understand teachers' frustrations and dilemmas, and they will value the very important work which is carried out in schools. There's a new mandate for everyone: try to find the other day. If it's not there, the next step is to ask how schools and families and communities can recreate this day in modem times. Creative and realistic suggestions will emerge: students must be allowed to participate more actively in the dynamic world of work. Junior high students could have at least one day a week out in the work world, with guidance and encouragement from adults, with a little remuneration, and with the opportunity to use their enormous creativity.

But such "other" days must not be viewed as an add-on or as compensatory, so that it's a day for losers and under achievers. If that were the case, the other day would become yet another way to increase the growing class divisions in Nordic countries. The other day can give inspiration and light to the building of a new path to schooling in the modem world. We must dare to take the challenge, otherwise teachers will continue to watch students slip out of their hands. We must dare to think in new ways and try new things. We won't grow if we don't demonstrate the will to change.

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Paper Presentations

Virtual Rural Community Development: Human Links That Sustain Web Links

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Abstract

Information technologies hold promise as tools for rural leaders to sustain the rural way of life as an option to the urban alternative. World wide communications and information availability pose a significant challenge for rural citizens accustomed to human contact as essential in building communication, trust, and new visions. Efforts to build actual or virtual rural communities with increased vitality and vision, let alone economic or political clout, need to accommodate this fierce reliance on self-sufficiency and independence. These values may in themselves be part of the lure of the country for many of the urban and rural high talent people who want to maintain their individuality and yet share in the development of benefits of global interdependence.

Traditions of self-sufficiency and independence have long characterized the rural populations of the Midwest, including tribal societies. These values have often limited collaboration and accommodation of change. The outmigration in the Upper Midwest (the Dakotas, Iowa, Nebraska, and Minnesota in this context) deeply concerned a group of citizens and University of South Dakota faculty in the 1990's. A mix of professors, farmers, lawyers, educators, scientists, and business people came together to consider how to stimulate traditionally competitive and isolated South Dakota peoples to collaborate for economic, social, educational, political, and cultural gains.

A Center for the Advancement of Rural Communities (ARC)

This group became known as the Center for the Advancement of Rural Communities (ARC) with physical location in Vermillion, South Dakota, but a virtual reality across the nation. The group is composed of members who either currently live in this rural part of the Midwest on the borders of South Dakota, Iowa, and Nebraska, or who have roots in the farms, small towns, or reservations of the region. Some members live in Maryland and Virginia, but they all share a strong concern for rural social and economic development. Primary premises of ARC include the importance of the rural or country living alternative, the value of conversation and sharing, the importance of education and training in rural development, the significance of protecting the rural environment, and a strong desire to see interdependence at work in the Midwest among the people, the professions, and the smaller communities.

The primary agenda of ARC during the past three years has been to explore the uses of information technologies in the further development of actual and virtual communities in the region. Some of the ARC experience links to that of the education and business faculties at the University of South Dakota in which college faculty have linked with small communities to initiate projects to encourage professional people to work together for improving their educational and economic futures.

Other links have been through business and industrial organization members who have interests in creating business and research parks. Additionally, there have been interests in establishing tourism and recreation centers, particularly related to tribal and rural cultures. Some of the members of ARC have had organizational development education and consulting experience, and the organization expects to grow.

Over the past three years, ARC has relearned many times that for rural citizens, a technology connection must follow live interaction and trust development. ARC members set out to build live and virtual resources for linking people in South Dakota, the Midwest, and beyond. Links have been made to date in Alabama, Thailand, and Brazil. The goal has been to bring rural advocates together to share concerns and successes, to build political coalitions, and to take charge of the future for the rural alternative for living.

Actual and Virtual Rural Community Development

ARC members have become informed about the importance of Internet resources in marketing new ideas and business ventures. As linkages with other like-minded rural groups have been made, the concept of developing a virtual rural community has become a primary focus for ARC. The need for a WWWeb resource on successful rural development projects has been part of ARC discussions. Some ARC members were supported by the Office of Research at the University of South Dakota to present this concept at the 1999 national conference of Partners in Virginia.

The ARC volunteer group began with the hope that their effort might bring to the Southeastern part of the state a "gateway" recreation or tourism center to the prairie in real and virtual terms. The ARC group came together to explore concepts for social changes which might benefit the people in their rural areas. This group has worked to explore the realities about why rural people are suspicious, if not hostile, about the "intrusion" of technology and "outsiders" on their lives. The group established itself as a kind of think tank for confronting rural citizen values.

The ARC Center members choose to support the concept of rural or smaller group living. By choice people commit to the importance of relationships, family, closeness, and the value of life on the land. Some of the ARC members share a Native heritage and small town or farm background. They have deep commitments to living in small family groups. Rural people with these roots have some guarded suspicions of urban life and expanding technology.

As individuals shared details of their lives in face-to-face meetings, then phone conferences took on new meaning. Then, email became much more frequent and meaningful. The writers suggests that at least for the current generation of rural community adults, face-to-face communication must precede use of Web/technological resources for further expanding community to accrue the benefits in economic, social, political, or educational terms.

A Regional Telecommunications Project

Some of the ARC members became directly involved in an education project, which linked 12 rural communities in the region to bring high bandwidth interactive video distance learning options for students and community members. The project became known as Southeast Interactive Long Distance Learning Project (Southeastern South Dakota). It required the merging of the interests of small communities--a real test of leadership in rural community expansion. Technology was a primary means for bringing people together.

The University of South Dakota School of Education and a regional vocational school in Sioux Falls participated as members in this project. Two years of dialogue were necessary for establishing the base of trust, common schedules, programming, and mutual benefit options for the twelve communities to become a functional distance learning program.

Experience with this project, still ongoing, gave ARC members increased enthusiasm that citizens and professionals can take advantage of technology resources to improve school curriculum offerings and to build new concepts of regionalism. Clearly, the strategic planning to initiate this project in an environment in which State political conservatives were continuing to attempt to find the least expensive means for supporting distance learning required considerable face-to-face communication. When Southeast Interactive Long Distance Learning Project development process began in early 1996, most of the participating school districts were not using the Internet or email.

In February of 2000, however, email and the project Web site are central to project administration (http://www.usd.edu/sildl). Completion of the linkages among participating communities, both electronic and personal, is testimony to how collaboration among competitive communities can be achieved.

McMahon and Salant have indicated that rural strategic planning is essential for rural communities to make use of information technologies. Unfortunately, the high-speed broadband infrastructure necessary to realize these opportunities (electronic commerce, distance learning, and telemedicine) often bypasses rural areas, which may lack the market to attract such investment or may fail to capitalize on local resources. Consequently, rural communities must develop a plan that identifies strategies with the most potential for taking advantage of telecommunications (McMahon and Salant, 1999).

Regional telecommunication development, as well as most any rural economic development, requires rural citizens to envision a larger community. This requirement comes into conflict with traditional values of self-sufficiency and independence. In the Southeastern South Dakota Regional Telecommunications project it took a lot of skillful and respectful talking to get fans of one of the local school football team to embrace the next small town's promoters as loyal members of the same community.

Finding National Friends for Partnering

ARC has remained committed to the belief that Web/technological communications can be of important benefit to linking rural communities with common goals. ARC has worked with a national organization (National Association of PARTNERS IN EDUCATION) (hereafter called PARTNERS) to explore the interests of national and international rural groups that desire to collaborate as a community in designing programs and projects to maintain their style of living, particularly as an alternative to urban models (Asche et al., 1997).

The ARC group were advocates that electronic communications, particularly with full motion video capabilities, to connect rural neighbors locally, regional, or in the world be "brought into the family" for economic, social, and educational benefits. The ARC group set about in 1998 to try this perspective out. This paper reports initial experiences in promoting the concept with rural people.

Challenges for Change for Advancing Rural Communities

Among ruggedly independent people in rural settings, such as in South Dakota, the concept of community-linking is abstract and fragile. A person needs significant trust and many handshakes to establish new relationships that might be called friendships. So, what applications may be made of Internet resources to join communities into more cohesive and competitive blocks? How can technology be of use in building collaboration for achieving economic, educational, or social goals?

What can citizens do to harness Web/technological resources to expand and sustain relationships and projects? What does it take to empower people who have been struggling independently to survive in a global economy to become a broader, more economically viable virtual rural community? What has been the experience of a citizen and university group in South Dakota in making the human links that are essential for initiating electronic links?

In sparsely populated regions of the central and western United States, it is common for towns to be smaller than a thousand people and for rural homes to be more than ten miles apart. While the advent of more rapid travel and technologies for communication have made wide expanses of land less ominous for human development, reliance on trust and experience remain as the foundation of the concept of community.

Rural people are difficult to group together. Despite the homogenizing influence of television and other electronic media in producing a nearly uniform suburban culture across the nation, small communities in sparsely populated areas have retained distinct cultural traditions and identities. These have been based on the cultural inheritance of their residents and the unique challenges and opportunities of the land which has provided their sustenance.

These are not cultures frozen in time. Lakota people live in frame houses, not tipis. Yet each small cluster of homes is a community with its own sense of identity. The Lakota language and culture continue to grow and adapt. Old country languages are no longer spoken on the streets of small towns settled by Danes, Norwegians or Irish, yet the patterns of relating retain a distinctive flavor in the respective communities. Remnants of old wounds, resentments and suspicions of outsiders remain as obstacles to cooperation.

Yes, there are the poor, the rich, the informed, the less informed, culturally same, culturally different, the well-traveled, and the isolated. Many communities in South Dakota have yet very active memories about the tyranny between Native Americans and encroaching settlers, between Scandinavians and Germans over the same land and community governance, among fundamentalist religious groups and the irreligious, and among political parties with many exaggerated promises for recovering or advancing rural economies.

The population shifts away from agriculture have left the landscape littered with crumbling houses, businesses, and farms that constantly remind citizens of the risks of change. New technology for farming means expensive equipment and discarded fences and larger production units that threaten the existence of the smaller, more intimate, and engaged social units. New visions for rural communities have to pass the scrutiny of rural citizens who know the effects of isolation from urban growth.

There have been examples in recent and past times of communities coming together to build barns, rebuild a burned house, or to save a town from a flood. The sense of neighbors helping each other remains a strong rural value. ARC members realized, however, that something as abstract as using telecommunications technologies to link widely distributed small groups of fiercely independent people would take some significant planning and energy. Why would separate communities that have been independent, indifferent, or competitive desire to help each other? Goals for building broader, more inclusive communities were always first on the agenda in regional exploratory meetings.

An ARC Manifesto for Community Living

Consensus of ARC members has been that relationships must always be at the heart of a good community. Things and money are not what necessarily create happiness. It's the relationships and friendships that count. The following dichotomies may reflect the ARC perspective:

Country Living--the Choice of Some of the Highly Talented

There is increasing evidence that some of the best educated and most talented members of the global human resource pool desire the country life. The clean air, the neighborhoods, the gardens, the ride on the prairie, and the horse in the back yard are some of the items that have been mentioned by ARC members as counter to the urban problems of pollution, crime, and over-choice. Joel Kotkin, a senior fellow at the Pepperdine Institute for Public Policy, said recently that states that have frequently been considered behind the times, such as Nebraska, are beginning to experience selective rural community growth.

Big companies that depend largely on manufacturing have been heading to the hinterlands for years, seeking low taxes and compliant workers. But now it's the brain-intensive industries, and more importantly the people who start them, who are headed out to the country.

Although technology is the enabling factor, the primary driver may be the increasingly repellent features of the big metropolitan areas themselves. With traffic, smog, and crime invading even oncepristine nerdistans such as Silicon Valley and Orange County, there may be a greater allure for opting for a small-town lifestyle--as long as it's sufficiently wired (Kotkin, 1999).

The Midwest may be a preferred migration stop in the future for additional sophisticated individuals. According to research done by Adamson and Partridge, "the Midwest region has one of the highest probabilities of urban-to-rural migration in the U. S. According to the study sample; but more importantly to small town economies, the study found that workers in this region are less likely to ever leave the rural sector" (North Sioux City Times, 1998).

The Promise of High Touch with High Tech

Discussions with rural citizens frequently centered on how high technology linkages may have anything to do with "touching them where they really live." Will values for honesty, love, dignity, and truth really be a part of developing Web/technology communications, or is this communication to remain either totally impersonal, or worse, a marketing medium for "clever big city hucksters" who are just so many more music men selling trombone cases?

New human linkages of vitality and hopefulness are certainly in the rhetoric of digital technology advocates. In promoting, engaged, and interactive "live" environment in rural communities, ARC leaders have experienced that rural people of diverse backgrounds and characteristics will come together to consider their alternative futures and the impact which technology could play, both positively and negatively. The perennial concern in discussions has been whether the Internet, the Web, Microsoft, or "info-tech-babble" will mean anything to the family interested in sustaining relationships which nurture its members. Considerable effort is needed to establish common ground for sustaining valued mature relationships and for developing technology applications to reflect intentions and values of rural people for use in rural community development.

Projects to Test the Transfer of Handshakes through Technology

For decades, human resource and organizational development literature has maintained the importance of establishing a process that encourages listening and sharing among members of subgroups if leaders wish to influence norms and mores. This is particularly so with today's "knowledge workers" (Sherman et al., p. 8). This process is no less important in rural community development. To share in the burdens and benefits of society, individuals in organizations and communities need to have opportunities to participate and to grow.

Early in the formulation of ARC, members realized that exploring goals, listening and sharing, taking time together socially and on projects, and following-through after meetings to reinforce each other's contributions and values were all important steps. ARC members have been involved in establishing live relationships with several entities to test the extent that virtual communities may be enhanced with technology follow-through. ARC members have established connections with a national organization focused on Partnerships, Native American communities, a traditionally all Black university, small towns, schools, and a USD-Brazilian linkage all of which will be briefly described.

A Tribal Community Development Project in Education

One ARC member has participated for two years in dialogues among Midwestern Tribal Colleges. With a Kellogg Initiative grant under the leadership of Oglala Lakota College in South Dakota, tribal colleges have sought to develop accredited graduate education programs. The need for patient and culturally sensitive communications for a non-tribal University faculty to play a role in offering assistance to tribal initiatives has been impressed upon ARC members. It takes time to build live relationships, and apparently no amount of print, email, or video can replace the need for people-to-people interaction at the start. With a base of trust and exchange, however, there is potential for virtual community to grow.

A Link to Brazil

In 1998 the University of South Dakota School of Education was able to employ a new faculty member who was native of Brazil. With her established relationships in Sao Paulo, other faculty members from USD were introduced in person to establish shared goals in teacher education development. After face-to-face contact, telecommunication and email linkages followed into 2000. This experience added to ARC and USD faculty knowledge that linkages across cultures can be established. The importance of shared goals, live interaction, clear intentions, and follow-up communication through email, with pictures, seemed to be the outcome requirements for making this relationship happen.

Tuskegee and Vermillion

Linkage was made by USD School of Education faculty to establish relationships and potential for shared telecommunication projects with Tuskegee University, a traditionally all Black institution. As USD has been a traditionally all White institution, the deans of both universities determined that they might collaborate to establish an exchange of faculty and students for increasing diversity on both campuses. After a year of letters and email, it was clear that face-to-face meetings on both campuses were required to establish more than academic contacts. These exchanges were arranged in 1998 and 1999. The result was collaborative grant project development. The experience suggests that virtual community may be expanded if the appropriate base is developed in live interactions.

A National Partnering Organization for Facilitation Process

As ARC searched Web resources for organizations with similar goals to stimulate citizen participation in community development, the Virginia ARC member learned of the National Association for Partners in Education (PARTNERS) through a social acquaintance. After a two-year process of handshaking, goal sharing, listening, speaking, conference presentation, and training, ARC and PARTNERS have formed an on-going link that has been sustained through email and many teleconferences. Tolerance for use of electronic communications has increased rapidly. Most meetings have included at least six of the nine ARC members at once with PARTNERS leaders. The power of simultaneous mutual influence seems to be at work in maintaining the ARC group momentum and in keeping the members motivated to participate without financial reimbursement.

With a training grant from the University of South Dakota Office of Research, three ARC members participated in a PARTNERS training program in 1999 which is designed to prepare leaders to facilitate citizen participation in planning for change in education. The process focuses on engaging people to collaborate in looking to the future and to the past to take stock of the resources available for improving community life. PARTNERS began two decades ago in support of encouraging citizens to volunteer to mentor school children. It evolved to enlisting the support of businesses to adopt schools, as well as continuing its support of linkage of citizens to school children.

The PARTNERS linkage has shown that a small citizen group in South Dakota can find friends in many places, including Alexandria, Virginia, where PARTNERS headquarters are located. This is an organization that most any community would enjoy knowing-people who have as their business the development of relationships in and across communities for the sake of improving the learning and living environment for children and adults. (NAPEhq@NAPEhq.org.)

More recently the PARTNERS agenda broadened to encourage citizens and educators to expand their constituencies to empower many more people to participate in community development in the global society. It was particularly noteworthy to ARC members that PARTNERS in 1999 recognized that most of its training programs and materials were focused on suburban settings. ARC inquiries, handshakes, and face-to-face contacts with PARTNERS led to an ARC contract to suggest modification in PARTNERS materials to make them more useful in rural Midwest communities, including Native American sites.

Link with the Heart of Native American Communities

The PARTNERS process for engaging citizens in focused conversations was taken to the White River, South Dakota, community for application in February of 2000. PARTNERS leaders participated by teleconference in the initial White River and ARC meetings in February of 2000, with no apparent discomfort or suppression to the focused conversation. White River is in the heart of a Native American community, with the town bordering the Rosebud Sioux Reservation. ARC members facilitated a dialogue with representatives from White River Schools, a four county rural development organization, and Native American community members. Participants included school board leaders, citizens in rural economic development, technology advocates, White River School's Indian Education Committee and tribal college representatives interested in rural education and economic development.

The process of building rural community; expanding it, and supporting communication with technology takes time and some money for initial travel expenses. ARC members from Maryland, as well as South Dakota, participated in discussions about technology impact on ranch, reservation, and education system functions. Most expenses of ARC linkage initiatives have been born by members as individuals. This is a measure of the strength of bonding among members and their goals. After building relationships, exchanging family stories, taking stock of each other's goals and considering just what the boundaries of "our community" might be emerged linkages. Upon establishing linkages with people who seemed to latch on to the idea that after a handshake, a face-toface meeting or two, the email began to flow.

In the building of communication linkages, style and intent seemed to matter. The ability of facilitators to reflect warmth, interest, and exceptional listening skills and accurate recording skills appeared to be essential in the White River linkage with ARC from Vermillion. The challenge has been to determine if a new sense of community could be made between communities at more than convenient travel time (300 miles apart) and across cultures. Can people allow each other to expand their sense of community? If the regional efforts to expand community continue to be successful, then ARC members desire to tackle the challenge of linking with other communities in the nation and the world which have goals to design projects for rural community advancement. A basic premise for linking is in the phrase, "Together we shall overcome.

This White River experience of ARC members seemed to further underscore the importance of initial live contact and trust development to introduce the possibility of Web/technological resources for community development. In rural and tribal communities there must be a lot of listening, sharing, and genuine honesty to build a base for exchange. It also helped to have one of the ARC members to be an enrolled member of the Rosebud Sioux Reservation and formerly a member of the White River community.

ARC members realized that people are most receptive to new ideas from people they know and trust already. In the Midwest, citizens learn from early childhood the importance of one's word and the significance of a handshake. It remains to be seen if a virtual rural community, with membership across the state or nation can be sustained in the White River area. First signs look very promising. It all seems to center on trust in a future vision which may assure individuals that the benefits of society can be within their reach. Participants need to understand the importance of their individual roles in contributing to the further growth of a better world.

State and National Agendas

In South Dakota, implementation of the Governor's plan to link all of the schools in the State has continually stimulated the climate for applications of information technology. Similarly, the National Presidential agenda to link the schools and to connect every home, including rural citizens to the Internet has served as an additional catalyst for rural discussions of future uses of technology.

ARC members have observed, however, that some rural citizens apparently feel so overwhelmed with so much emphasis on technology that there is a resolve to go slow and delay involvement in decision-making, rather than to "get with it." If dialogues with rural citizens are initiated with emphasis on the importance of keeping up with technological change, many citizens will withdraw from participation. Instead, meetings need to focus on citizen perspectives on the forces, which seem to be at work today. Many citizens, even those with some literacy in technology, seem to already have resigned themselves to being "out of touch" in making meaning of telecommunications.

Summary

Linkage of rural communities and setting goals for regional and broader communities is a major challenge. Contemporary technologies hold promise to help bring people together on common ground and to build new coalitions which have importance. But, the concept of a virtual community--relationships among people of shared values and goals--requires systematic human relations development through live face-to-face communication before electronic resources may be used.

The ARC members have their own data on the challenge of sustaining virtual relationships in its own members' efforts to work together, despite the distances of members living from South Dakota to Virginia and Maryland. It's about time zone differences resulting in two hours of communication down time for lunch hours--and other conflicts in the rhythms of the days. It's about sending back edits when there is risk that they may not be on target or wanted--and wondering whether by doing so a budding friendship may be unnecessarily tested. It's about long electronic silences without the gestures that signal listening. Did the email go through? Did they have time to read it? Did it have meaning for them? Did I offend them?

It's warm replies that encourage communication. But, when misunderstands do occur, it is as important to hear this bad news as the good. It takes courage to "shoot in the Internet dark" when children, families, and culture are at stake. It's all the challenges of complex communication with limited visual clues which caution ARC members to make current Internet applications with care. As more full-motion video becomes within the reach of most members of society, there will likely be more enthusiasm for communicating across traditional social barriers. To persist in building real or virtual communities, it takes commitment and it tests trust in love, but the rewards are in new friendships and projects with outcomes in economic and social progress.

A Center for Advancing Rural Communities, with an agenda to use electronic information resources, has been established in Vermillion, South Dakota, and leaders invite inquiries to link, to chat, and to plan how rural community linkages may expand educational, economic, social, and cultural opportunities across the world.

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No to	Yes to
a. huge malls and mega cement parking lots	a. knowing the storekeeper
b. over choice and what's cool today	b. friends and family
c. frenetic management of the stock market	c. . peace and some pets
d. bigger engines and flashier stripes	d. a walk in the grass and trees
e. keeping up with the Jones's	e. a potluck with the Smiths
f. freeways and urban sprawl	f. care for the land and farms
g. getting Johnny into Harvard	g. quality education for all
h. competing to be in the know and dough	h. cooperating to learn and grow
i. thousands of animals in feedlots	i. concern for quality of life
j. dominance by corporate stock interests	j. power to the people
k. myself	k. together

Literacy And Numeracy Needs And Priorities: A Case Study Of Regional Tafe Courses In Western Australia

Anne Chapman & David Pyvis, Australia

This paper reports research into the literacy and numeracy needs and priorities of regional Technical and Further Education (TAFE) students in Western Australia taking courses which have further study options at university level. Case studies were made of four regional TAFE courses. Profiles of these courses were constructed in order to distinguish their particular literacy and numeracy demands. Curricular and pedagogical strategies for meeting these demands were identified from lecturer and student perspectives and practices. A review of university policies on literacy and numeracy was undertaken to contextualise the case study findings. A list of needs and priorities of the students was then compiled from an analysis of the profiles, strategies and policy review. Elley (1992) notes that "traditionally urban students have had many educational advantages not enjoyed by their rural counterparts" (p. 63). Among those disadvantaged therefore are TAFE students living in rural and remote areas. It follows on that TAFE students making the transition from rural and remote areas of WA to urban university environments are also likely to face educational challenges. This project addressed these challenges, which were found to be intensified by different understandings of numeracy and literacy held within the TAFE and tertiary sectors. This project also addressed issues of how further study options at (what are generally urban) university campuses are facilitated by the literacy and numeracy strategies and practices in place in regional TAFE courses, how those strategies might be located within a tertiary literacy and numeracy policy context and what constitute the needs and priorities of regional TAFE students taking courses offering university study options. For both the TAFE and university sectors, the significance of the project is that it will inform the provision of literacy and numeracy policy and practice in university-option TAFE courses.

This paper reports outcomes of research into the literacy and numeracy needs and priorities of Western Australian regional TAFE (Technical and Further Education) students taking courses which have further study options at university level[31]. The project involved case studies of four regional TAFE courses; profiles of these courses were constructed in order to distinguish their particular literacy and numeracy demands. The paper describes the curricular and pedagogical strategies for meeting these demands that were identified from lecturer and student perspectives and practices. It also outlines the student needs and priorities that were compiled from an analysis of the profiles and strategies.

Elley (1992) notes that "traditionally urban students have had many educational advantages not enjoyed by their rural counterparts" (p. 63). Among those disadvantaged therefore are TAFE students living in rural and remote areas. It follows on that TAFE students making the transition from rural and remote areas to urban university environments are also likely to face educational challenges.

The project reported here addressed these educational challenges, specifically the numeracy and literacy needs and priorities of regional TAFE students. These challenges may be intensified by different understandings of numeracy and literacy held within the TAFE and tertiary sectors. In the TAFE sector, approaches to literacy and numeracy generally are informed by curricular and pedagogical developments in adult education, such as in workplace programs, including vocational training and labour market programs, rather than developments in tertiary education. For example, workplace literacy programs typically treat literacy and numeracy as integrated through a recognition of the demands of specific employment and professional contextual situations.

In the university context, discourses about literacy generally evince the understanding that literacy is discipline-specific, comprising generic skills for coping with the language, literacy and communication demands within and beyond a course of study. These skills may involve, for example, the use of mathematical ideas and techniques, thus situating numeracy within the repertoire of 'academic literacies'; that is, within the literacies relevant to university study.

The project therefore sought to address, in a variety of ways, issues of how further study options at (what are generally urban) university campuses are facilitated by the literacy and numeracy strategies and practices in place in regional TAFE courses, and what constitute the needs and priorities of regional TAFE students taking courses offering university study options. For both the TAFE and university sectors, the significance of the project is that it will inform the provision of literacy and numeracy policy and practice in university-option TAFE courses.

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[31] The project was an Innovative Adult Literacy Research Project funded by the WA Adult Literacy Research Network Node of Language Australia: National Languages and Literacy Institute of Australia.

The integrated approach to literacy and numeracy taken in this research is in line with those of the TAFE and university sectors, and conforms with the *Australian Language and Literacy Policy* (Dawkins, 1991) which offers the following definition:

> *Literacy is the ability to read and use information and to write appropriately in a range of contexts. It is used to develop knowledge and understanding, to achieve personal growth and to function effectively in our society. Literacy also includes the recognition of numbers and basic mathematical signs and symbols within texts. Literacy involves the integration of speaking, listening and critical thinking with reading and writing (Companion Volume: 8).*

Context

The context for the study was provided by four regional Western Australian TAFE courses with further study options which include university study: Associate Diploma of Health Science (Enrolled Nursing); Certificate III of Tourism; Diploma of Children's Services (0-5 Years); and Certificate III of Information technology. The target courses were chosen to represent a range of remote and rural courses and sites. Three of the courses exemplify those leading to tertiary programs in the social sciences and health science programs. The other is a commerce/technology oriented course, chosen to more clearly enable a numeracy focus.

Strategies

Literacy and numeracy strategies employed by the lecturers in the teaching of the target courses were identified from informal interviews with lecturers and students, student responses to questionnaires, and a review of curriculum documents, assessment tasks and student work samples.

Modelling Vocabulary

Lecturers shared the view that their teaching tasks involved helping students develop competency in the professional discourses pertaining to particular units being taught. Exemplifying this perception, the Health Science lecturer referred to "medical terminology" as a "new language" and as a "second language" for students.

One strategy typically used to facilitate this language acquisition was modelling. To continue with the example of the nursing lecturer, the effort was made to "use the language of a professional nurse". In the simplest illustration of this approach, in class instruction a mannequin on which students practiced was identified as "the patient".

Assimilation

A language familiarisation strategy observed with one class involved the lecturer breaking down or 'unpacking' professional phraseology. Introducing the concept of 'physical and motor competence in the one to three year old' the lecturer asked students to identify some of the milestones in the first year or so of an infant's life. When the students mentioned mastery of such skills as rolling over, sitting alone, crawling, pulling oneself up and so forth, then the lecturer repeatedly referenced these as 'motor skills'. In a short time, in discussion, students were using the term interchangeably with the skills identified. When the lecturer saw that the students were comfortable with the terminology then a more formal definition was given for the students to write down.

Transformational Shifts in Language

To develop competency in their professional discourses, two lecturers used the strategy of interchanging 'ordinary' and 'technical' phraseology. They also encouraged this practice with their students. For example:

Students might master the jargon but they have to show they understand it. I had one student. He was good at trotting out the textbook phrases. For example, in an essay he'd write up a procedure, say for bathing a patient, as 'give all nursing care required'. I'd say, what does it mean to look after the patient? You must itemize this 'nursing care', break it down. Explain what you must do when you wash the patient in the shower. How you position the soap!

Definitional Practices

Lecturers typically provided students with formal definitions of professional terms. For example, students working in the Information Technology course reported being given blackboard definitions of terms such as 'network', 'node' and 'interface card' to copy down. Often the definitions utilised more professional terminology thus 'embedding' the students more thoroughly in the discourse. For example, 'hardware' is defined as the Ethernet, modem, satellite dish and cable uplink. In the courses, a typical strategy for encouraging a commitment to memory involved the lecturer using a professional term and then asking students to orally provide its formal meaning. However, lecturers were flexible and utilised a variety of methods to encourage student acquisition of definitional meanings:

One student . . . he was falling behind. He tells me he has trouble remembering facts. I say, write on little cards things like "the body has 110 bones in it" and "there are 128 days in the life of a blood cell". Put the cards next to the toilet roll in your toilet. Put them on your toilet wall, somewhere where you will see them every day. Then memorize them . . . he says it has helped him. His exams have improved.

Professional Context

In the TAFE courses examined, a strategy recurringly used for developing literacy and numeracy competency in the particular professional discourses involved utilising professional contexts. In the Information Technology course, for example, students developed tables and spreadsheets relating to employment by gender by using 'real' data from a 'real' employer organisation. In the Tourism course, students conducted a stocktake of a local business. Lecturers also tried to situate literacy and numeracy learning in professional venues. For example, students in the Health Science course were taught literacy and numeracy competencies in an annexe of a local hospital.

Students in the tourism course were asked to go out into the bush and act out being tour guides, which entailed practising a specialised vocabulary. Even when confined to the conventional classroom, lecturers sought to inscribe literacy and numeracy demands within a professional context. For example, the lecturer in the Children's Services course demonstrated to students how to wash small children's hands. As she did so, (in her own account of this procedure) she "talked the students through". Then, individually, the students had to 'talk through' and perform the procedure before the class. The lecturer emphasized that her whole approach to her job centred on "teaching the students how to teach".

Use of Register

The lecturer in the Children's Services course utilised a teaching/learning strategy for literacy and numeracy which involved accustomising students to choosing the appropriate register. In one of the student's words:

We are learning that you need to use positive language with children. For example, we have learnt that we have to avoid using 'don't' and 'no'. The theories are useful. We learn how to speak to people tactfully. Parents sometimes come up to you. They want advice, say, on what they should be feeding their child at 8 months if it was born premature and we have been learning how to choose our words so that we don't make parents feel inadequate.

Interpersonal Exchanges

This strategy for learning literacy and numeracy competencies was utilised by all the lecturers. Whereas repertoires of interactional strategies varied, the lecturers all oriented interpersonal exchanges towards establishing and fostering friendly, mutually respectful trusting relationships. There was concurrence that having such relationships supported the teaching/learning of literacy and numeracy. Students universally made the same observation. There were recurring endorsements of a relationship with the lecturer that was "one on one"and "personal". There were also recurring claims that learning had taken place because of the learning environment the lecturers had established. Lecturers were spoken of as "friends" and as "helpers". Without any prompting or questions structured to elicit such answers, students at each campus chorused their approval of their lecturers' approach to classroom interactions. One lecturer commented:

I think teaching and learning require trust and cooperation. I think you have to let students know that they do matter to you. I try to portray us, the teaching staff, as caring people. At Orientation, I tell the students we are caring. I tell them that we will be concerned about them, will be there to help them. I say, come and talk to us if you have problems. I talk about the importance of trust.

One of the ways in which lecturers achieved interpersonal relationships with their students that were conducive to learning (literacy and numeracy skills) was (in one student's words) "by being available and not just at some set time". Students typically appreciated this approach and saw the lecturer's concern for them as instrumental to their learning achievements.

At one regional campus, students reported that they expected to lose their lecturer for the next year (due to a shift in the mode of teaching) and had initially been very concerned at her departure, but now were not quite so worried because she had advised them that "if we need any help she is only up the hill and over the back fence".

Life-long Learning

Lecturers in the Associate Diploma of Health Science and Children's Services courses both sought to ensure the ongoing development of literacy and numeracy skills by encouraging students to the view that (in the words of one lecturer) "learning never stops" and (in the words of the other) "learning is for life":

This is the philosophy I try to instil, that learning is a life-long process. I say, while you are here and when you leave here and move on to university or into a career, keep learning, keep reading and researching. Don't think you've already learnt everything from the theory in this course. Don't go into cruise mode, just because you've graduated!

Emphasising Importance to Employers and in Employment

A strategy employed by all the lecturers was to emphasise the importance of literacy and numeracy skills to employers. For example:

They'll say what does it matter if I don't reference correctly, if I can't spell? I'm not going to be doing that. I'm going to be working! And I'll say, you know so and so in the grocery shop, do you think she doesn't need these skills? You may not care if you can't spell, but do you think employers won't care?

Utilising Student Interests

One of the students in the Children's Services course supplied this evidence of a teaching strategy for increasing literacy competency:

One of the things we did to help us with, I guess, literacy, was that we had to pick a subject that we wanted to learn about. I did sharks. We had to research it and write an essay about it. Then we had to present it orally. We were asked to use as many resources as we could to help the presentation. I had pictures and articles and a shark's jaw.

Use of Multimedia

When asked about reading materials for the Information Technology course both students present advised that their lecturer often converted data from one medium to another:

Here we get full access to the library. And when the lecturer gets material that he thinks might be helpful to us he puts it onto our computers, so we can access it when we need it.

Diagnostic Analysis

The Health Sciences lecturer described "catching problems early" as one of her more important contributions to helping students develop their literacy and numeracy skills. The lecturer in the Tourism course mentioned that she would like to initiate a strategy of pre-testing prospective students for deficiencies in mathematical competencies and that a current strategy she employed in respect to both literacy and numeracy was "teaching to problem areas". The Children's Services lecturer advised that one of her strategies was to send students with literacy and numeracy weaknesses to a bridging course. Lecturers also encourage students to try various problem-solving strategies. For example, an Information Technology student said:

If I'm having trouble with the maths, one of he things he (the lecturer) will say to me is that I should start with the answers and then do the workings out until I reach the same result

Needs and priorities

A major outcome of the research is the following summary list of needs and priorities of regional TAFE students taking courses with a view to tertiary study, presented below. These needs and priorities are drawn from reviews of the literacy and numeracy profiles of the target courses, and literacy and numeracy strategies employed in the courses.

Be aware of the political, social and cultural dimensions of literacy and numeracy practices.

- be aware of how the regional study community context shapes literacy and numeracy demands and practices
- recognise similarities and differences in the literacy and numeracy demands of rural and urban academic study
- recognise similarities and differences in the literacy and numeracy demands of various TAFE and university courses
- display literacy and numeracy competency in a range of academic contexts

Integrate practical and theoretical aspects of course content.

Develop competency in professional discourses.

- use of genre structures
- use of register

Make transformational shifts between 'everyday' and 'professional' language.

- use of vocabulary
- facility with 'technical' terminology

Use appropriate definitional practices.

- make appropriate meanings
- recognise conventional meanings

- Establish repertoires of interactional strategies.
- participate in group activities

Demonstrate a high level of reading, writing, aural and oral communication skills.

- display competency in procedural communications
- display competency in technical communications
- display competency in personal communications
- display competency in cooperative communications
- display competency in systems communications
- display competency in public communications

Demonstrate competency in mathematical skills.

- use mathematics in mathematical and non-mathematical situations
- effectively use mathematical representations, including graphs, tables and diagrams, in a range of contexts
- use mathematical language appropriately

Approach literacy and numeracy as practices for self-directed and lifelong learning.

- utilise literacy and numeracy skills for lifelong learning

- continually build on literacy and numeracy competencies

Develop competency in multimedia technology.

Have sufficient access to essential and supportive resource material and facilities, including library, internet, computers and practical placements.

Conclusion

Literacy and numeracy profiles of four Western Australian regional TAFE courses which have further study options at university level illustrated a complex set of demands within the texts and tasks encountered by the students. This paper has described strategies employed by the lecturers for meeting the literacy and numeracy demands of their courses. These strategies generally were found by lecturers and students to be successful in enhancing learning. The paper has also drawn on the course profiles to outline the literacy and numeracy needs and priorities of students in the target courses.

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Learning To Leave: The Irony Of Schooling In A Coastal Community . . . Some Preliminary Findings

Mike Corbett, Canada

Introduction to the problem

On the first day of May the boats raced out as they had always done, laden down almost to the gunwales with their heavy cargoes of traps. They were almost like living things as they plunged through the waters of the spring and maneuvered between the still floating icebergs of crystal white and emerald green on their way to the traditional grounds that they sought out every May. And those of us who sat that day in the high school on the hill, discussing the water imagery in Tennyson, watched them as they passed back and forth beneath us until by afternoon the piles of traps which had been stacked on the wharf were no longer visible but were spread about the bottom of the sea ... And the spring wore on and the summer came and school ended in the third week of June and the lobster season on July first and I wished that the two things I loved so dearly did not exclude each other in a manner that was so blunt and too clear (MacLeod, 1976 143-145).

Paul Willis' (1977)ethnographic study of working class life and schooling in an English industrial city is introduced with the direct and poignant subtitle "how working class kids get working class jobs." Indeed, one of the central questions for the sociology of education has been and continues to be the role that schools play in reproducing class structure. Willis' question is central to understanding the relationship between schooling and class in urban communities. A similar yet seldom analysed problem confronts the educational researcher attempting to analyse the experience of schooling in rural areas. Alister MacLeod's fiction cited above, along with a large body of fictional accounts of coming of age in Atlantic Canada, work with a similar kinds of questions. Where Willis' lads learned to enact a working class identity which rubs hard against the middle class norms of school, MacLeod's rural Nova Scotian male characters wrestle not only with how to construct their class based identities, but also where. In rural communities school serves a number of functions including both the reproduction of labour in traditional local industries, and paradoxically, migration away from life in the communities to urban centres.

This study is an attempt to understand how it is that certain people remain in coastal communities and others leave, and specifically, what is the place of formal education in the migration process. In other words, how do some rural youth learn to leave while others learn to stay? To understand this problem, I employ quantitative and qualitative methods and the conceptual frame of resistance theory. This research comes out of a practical struggle with professional and personal issues connected to living and teaching in a coastal community. While Digby Neck is a typical, single industry, fisheries focused Atlantic Canadian coastal community, this community was chosen for study because it is where I have worked since 1990, and it is where I continue to work. In my thirteen years of professional practice as a teacher in coastal communities it is obvious to me that significant levels of resistance to schooling are rooted in rural identity constructions which are themselves connected to community based economic opportunities in the fishery and its spin off industries. On Digby Neck, these opportunities have persisted until the late 1980s.

The kind of "resistance" to which I am referring here is not necessarily opposition to the logic of capitalism or a "penetration" of how "the system" works to exclude rural youth. In fact, resistance to school seems to be an accommodation of individuals to the need for labour (in the case of working class youth), or opportunities for significant incomes (in the case of privileged children whose families worked in fish dragging) in the industrialising fishery of the 1970s and 80s. In my view, place attachment is also at the root of school resistance in local communities and it represents the incompatibility of integration into local culture and what I call the migration imperative in rural schools. Several researchers have found the nature of secondary and post secondary education to be deeply problematic for rural youth because it necessarily involves leaving home (Looker, 1993; Looke and Dwyer, 1998; Jones, 1995, 1999a, 1999b). The implication of these findings for this study is that emotional and economic connections of rural spaces may work to impede the acquisition of educational credentials for rural youth in ways not experienced by urban young people. At one level the decision to leave school and remain in the rural community amounts to the 'choice' of a known, integrated rural subjectivity, one which is systematically demeaned in school (Creed and Cheng, 1997; Brandau and Collins, 1994). On the other hand, the decision to pursue higher education may well be understood as a choice to leave the community in which one was born and which contain virtually all of one's social networks. Education is resisted because it implies leaving both geographic places and identity forming life worlds. This is the variety of resistance I analyse the theoretical sections of the dissertation, the post structural and postcolonial sense of resistance as a practice that opposes power in large measure by virtue of its alterity.

In this paper I will discuss the research setting, methodology, and some preliminary findings with respect to out-migration patterns from the quantitative part of the analysis of staying or leaving Digby Neck.

Research Setting Digby Neck

Digby Neck is a 30 km long, narrow peninsula jutting into Bay of Fundy in southwestern Nova Scotia. Never exceeding 5 kilometres in width, bounded on the North by the Bay of Fundy and on the south by St. Mary's Bay. To the west are a narrow passage and two small islands and to the north are several small villages and the town of Digby. "The Neck" as it is known is comprised of nine villages which extend from the head of St Mary's Bay in the east to East Ferry (so named from the point of view of the island joined from the east to the mainland by this ferry)at the western extremity. I refer to this collection of villages as a community because the discrete settlements that comprise the Neck are generally seen as belonging to the larger collective. Older residents remember the time, dating back to the mid 1950s before school consolidation and the paving of the highway when each village on Digby Neck had more of its own identity, but these days the 'community' is generally meant to refer to the nine villages that comprise Digby Neck. These villages are similar in that they were all settled in order to access the rich fishery on both St. Mary's and the Bay of Fundy.

The houses are predominantly wood frame and most are painted white and set close to either the main road (Highway 217)or one of the community access roads that branch off the main highway leading to a community wharf. The properties are generally well kept and neat in appearance. Some have the look of prosperity about them while others do not, but the norm is a modest respectability. Beside most houses are workshops and wood sheds. Many families in the community heat their homes with the abundant softwood that grows on family wood lots. Four wheel drive vehicles and half-ton pickups are the conveyance of choice and motorized four wheeler cycles are seen in the door yard of most houses. Many homes show signs of a connection to the fishery as lobster traps and assorted kinds of fishing gear are often stored near houses in the off season. Most of the villages continue to have more or less active wharves. The wharves continue to be the focal point of the economic life of communities on Digby Neck. During any given part of the year, there is some fishery in operation and the wharf is the landing and departure point for all fishing operations.

Despite the general consensus that the population and economic vitality of Digby Neck are both in decline, historic population figures show that the population has remained relatively stable from the 19th century into the 1980s when significant population decline began (See Tables 1). While the enumeration areas used by Census Canada and the Dominion Bureau of Statistics changed over the years, the overall population of the communities of Digby Neck fluctuated approximately 20% between 1871 and 1981. Generally the population has shifted down the Neck with population remaining far more stable in the western as opposed to the eastern part of Digby Neck.

> This is probably due to the decline of the small boat hook and line fishery and the rise of the small boat dragger fleet which has been documented by other studies of the area(Hughes et. al., 1960, Davis, 1991, Kearney, 1993).

The fishery has been, and continues to be, the economic lifeblood of Digby Neck. As one resident commented, "around here you either fish, cut fish, or throw rocks at gulls, there ain't nothing else" (Davis, 1991 15). Both traditional and modern methods of fishing for ground fish have been in decline on Digby Neck for at least the past decade, but both remain a shadow of their former economic importance. For instance, many lobster fishermen, fish with hand line and gill net from the end of the lobster season at the end of May until the late Fall when lobstering opens again. Other small boat fishermen who do not have lobster licenses also fish using traditional "fixed gear" (hand lines and gill nets mainly) during the Spring, Summer and Fall. The two large government wharves in Sandy Cove and Little River also serve as home for a mostly offshore dragger fleet ("mobile gear")which continues to operate on a limited basis despite restrictive government quotas and dwindling stocks. Several fisheries are emerging in formerly ignored species such as, herring roe or diving for sea urchins sold mainly on the Japanese market.

The population of this area remains remarkably homogeneous in terms of ethnicity. The limited amount of immigration of full time residents to Digby Neck which does occur comes in the form of women relocating to the area from surrounding villages in the Digby area or from Clare to marry or co-habitate with a Digby Neck fisherman. Few Digby Neck women bring husbands or lovers to live on Digby Neck. There is a well established and growing immigrant population of summer residents, particularly in the village of Sandy Cove and this group is said to be slowly but surely changing the way of life in the villages. In the village of Sandy Cove in particular and all along Digby Neck, large 19th century homes are still common. While some have been remodeled and updated, many retain most of their original architectural and design features.

A handful of small village convenience stores and one small general store currently operate on Digby Neck replacing the community general stores which supplied virtually all community needs until the opening of the highway in the mid 1950s. Recently a gasoline outlet has opened up midway between East Ferry and the "head of the Bay" which marks the eastern end of geographic Digby Neck. Several fish plants can still be found on the Neck, but most of these are either out of business or operate for only very limited periods. Most of the local fish processing is now done on Long and Brier Islands to the west or in the Acadian District of Clare on the other side of St. Mary's Bay. These plants are owned by local "fishtocrats" who have been relentlessly expanding their operations buying gear and licenses and controlling an increasing share of fish production in the area. Recently a salmon hatchery has opened in Mink Cove to supply the growing fish farming industry in the Annapolis Basin to the east.

The community has been, up until very recently, the source of significant employment for certain youth. It follows that Digby Neck is not necessarily constructed by inhabitants as a place to leave behind, but rather as a place in which one might make a living, albeit a difficult one requiring a variety of skills and capacities. Significantly, this complex of abilities is rooted in the traditional community and despite its challenges if offers both rewards and the comfort of the familiar (Brandau and Collins, 1994, Porter, 1996).

Methodology

To conduct the analysis I have employed multiple methods. I carried out participant observation in the community between August of 1998 and April 20. This participant observation involved taking part in community activities of a wider variety including both formal and informal social functions, school related events, home visits, conversations in stores, post offices, kitchens, fish sheds and on wharves. I also participated in several commercial fishing trips on both small inshore boats and larger mid-shore vessels. These trips ranged from a few hours to a five-day voyage.

I have been and continue to be in regular contact with many residents of Digby Neck both as a part of this project and as a normal feature of my personal and professional life. Indeed, this participant observation might be described as what Stenhouse (1975) calls teacher-research, or the systematic, critical investigation of one's professional practice. But I think it is more than that, there is more than my professional self in play here. In many respects it is difficult to separate this research from my life because both overlap and interweave in a variety of ways. For example, while I am a participant observer, I may also at the same time be a teacher giving advice about a child's reading or personal problem, or planning strategy with my informants/colleagues/friends about how to keep the school open in the face of declining enrolment, or helping to clean up after a community supper, or baiting traps on several small inshore lobster boat, or shucking scallops on a 65 foot dragger, or playing music at a social function, or building a greenhouse with a group of children and their parents, or giving advice in the community computer centre. These kinds of activities have both contributed to my growing understanding of community issues, ongoing and changing fisheries struggles, educational problems, and the generalised social context within which all of these interconnected currents take place.

To establish actual patterns of migration I have surveyed historic Grade 6 students who left Digby Neck Consolidated School between 1957 and 1992. I obtained school records from former administrators and teachers as well as from the Nova Scotia Provincial Archives in order to establish the target population. From these records I generated a list of all students who have completed Grade 6 on Digby Neck between 1957 and 1992. These classes correspond with the potential high school graduating classes of 1963-1998, a 36 year period. The individuals in this population range in age between 19 and 56 as of 1999. Because this is the only elementary school surviving on Digby Neck, its graduates represent virtually the entire native born population. Using local informants I then tracked each student in the sample to his or her present location, either on Digby Neck or elsewhere. I was able to locate all but three of the 756 students for whom I could find Grade 6 attendance records. I then conducted a simple survey which investigated work and educational histories for this population. I have able to find basic educational attainment data for approximately 70% of the total population. From this data I have established out-migration rates and correlate these rates with key variables such as high school completion, gender, and village of origin.

From this population I also selected informants for a series of ethnographic interviews. These interviews probed the experience of coming of age on Digby Neck investigating the central question concerning the relationship between formal schooling and migration in the coastal community. The sample was purposively selected for gender, village of origin, and age. I interviewed eighteen men and eighteen women, one half of whom had stayed on Digby Neck, the other half of whom were living further than 250 kilometres from Digby Neck at the time of the interview. In depth interviews were thus conducted with approximately five percent of the total population (thirty-six individuals)or twelve individuals (i.e. six stayers and six leavers) from each of three age cohorts. Cohort 1 are the potential high school graduating classes 1963-1974; Cohort 2 are the potential high school graduating classes 1975-1986; and Cohort 3 are the potential high school graduating classes 1987-1998). In addition, I interviewed a sample of twelve key educators who have served the people of Digby Neck through the period of study. This sample included both elementary and secondary school teacher sand school and system level administrators.

All 48 interviews were conducted between November 1998 and February 20. The interviews were supplemented by follow-up interviews with key informants and further formal and informal conversations on fishing boats, in fish shacks, in kitchens, in meetings of various types, at the community school and at various community functions. The interviews lasted between 45 and 90 minutes and focused on the five general themes work, community, family, schooling and mobility. The interviews were tape recorded, transcribed and given to the informant for verification. Most interviews with stayers were conducted in the homes of the informant. Interviews with leavers were conducted via telephone and tape recorded. Typically the informant was alone with me during the live interviews, but occasionally a spouse, child, friend or extended family member was also present, though these people rarely spoke during the formal part of the interview process. Virtually all live and telephone interviews were followed by extended general conversation (often lasting several hours) about educational, economic and social issues on Digby Neck.

Among the sample of educators, five of the twelve interviewees are currently working in the educational system, seven are retired, all but two within the last ten years. Nine of the twelve interviewees are women. The combined experience of these twelve educators is nearly 350 years, most of it spent either teaching on Digby Neck in the consolidated elementary school (and its one or two room community school predecessors before 1957), or in the regional high school which serves both children from Digby Neck as well as from other parts the immediate area surrounding Digby town. Half of the educators interviewed have worked in the consolidated elementary school, and thus, have experience with former students at the first part of their school careers. All but one of these six interviewees have lived full time in the community virtually throughout their lives. All but one are retired. The majority of these educators have worked children professionally in their elementary school careers, but have also been a part of the communities in which these people lived out their early lives. The other half of this sample of educators is drawn mainly from the regional high school where the majority of Digby Neck students go to attend secondary school. Two of these six informants are presently retired active service. All but one of these individuals have spent significant parts of their respective careers in school or system administration and/or counselling. These informants have experience with students from Digby Neck throughout their secondary school experience and are particularly well placed in the secondary school system to have a window on the career and academic decisions made by high school students from Digby Neck.

Who leaves, who stays, and where do they go?
First of all I sought to establish out-migration rates and patterns from Digby Neck. As Table 2 indicates, less than 30% of each of the age cohorts remain on Digby Neck. A surprising finding is that Digby Neckers appear to be less mobile in the more recent cohorts than in Cohort 1. Given the much publicised downturn in the fishery and the general "brain drain" hypothesis, one might have predicted that more recent generations of Digby Neckers would be more mobile. This data show a population that became less mobile through the "boom" period of the mid 1970s-1980s.

Migration is not a monolithic category. People migrate different distances and to different kinds of places. In the participant observation and interview parts of this research I asked long time Digby Neck residents to define what counts as "home" and what other kinds of places one finds in proximity to home. In addition to Digby Neck itself (home), three other spatial categories emerged. The first is "around here" and it encompasses an area within 50 kilometres of Digby Neck. People who are still "around here" are not really considered to have moved. The second spatial category is "not far." This is the area within approximately 250 kilometres of Digby Neck, and area, given improved transportation links, which can be accessed in an afternoon's drive. This is a median area and opinion is divided as to whether people now living in this region are migrants. As one resident put it, they have to be out of the province before I'd call them migrants. The final spatial category is away, and this is the area beyond 250 kilometres. People living beyond this region are universally considered to be migrants. When I analyse where those who migrate actually go an interesting pattern emerges. Table 3 shows that while approximately 70% of the population born on Digby Neck between the mid 1940s and the early 1980s moved from Digby Neck, more than 60% of this population remains within the around here spatial locus. When the frame is expanded to the not far region more than 80% remain within the circle. So while Digby Neckers are mobile in terms of leaving their fishing villages, they are far less mobile in terms of leaving the immediate locale and the Annapolis Valley and Southwest Nova Scotia. The brain drain hypothesis is far less convincing than anticipated and indeed, a great many Digby Neckers seem able to remain in the immediate region surrounding communities of origin.

Analysis of the gender structure of out-migration from Digby Neck shows that women are far more mobile than women in terms of actually leaving Digby Neck. Table 4 shows that more than 40% of men born on Digby Neck remain there. For women the rate is less than half that of men. Women have a stronger tendency to migrate to the "around here" region, and especially into the "not far" region. So while women are more mobile, they tend to move relatively short distances. Migrants who move into the area beyond the 250 km band are approximately equally represented by both genders. It is true that the coastal community of Digby Neck is mobile in the sense that people do not stay in their communities of origin. However, this data shows how the rate and distance of migration are influenced by gender. Surprisingly, migration rates remain fairly stable across the three age cohorts questioning the idea that people from single industry coastal communities migrate rationally or for purely economic reasons.

Education and migration

The data reported in this section are based on 505 telephone interviews conducted between November 1998 and April 20. Educational and work history data were gathered on 71.2% of the total female population and 66.5% of the total male population. The interviews were very brief consisting of 7 questions and focusing mainly on the level of education and current employment of respondents. Since this dissertation is attempting to establish and understand the connection between education and migration, this data is designed to gauge the extent of the migration/ education connection. Not surprisingly these data show significant educational differences between stayers and leavers in the population (See table 5). As anticipated, education is strongly linked with out-migration, particularly at the university level. Out-migrants who moved to the "away" region were more than eight times more likely to have attended university and thirty percent more likely to have graduated high school. They were also four to five times less likely to be in the lowest educational group never having made it into high school.

When the same data are analysed by gender the differences between male stayers and leavers becomes even more stark (see Tables 6 and 7). Male stayers are represented far more pervasively in the lowest educational category.

Both male and female migrants have acquired considerably more high school and higher educational credentials than their stayer counterparts. The differences are particularly acute among males where high school dropout rates were approximately 70% for the non migrant and "around here" populations. By contrast, more than 60% of women in all migration groups have completed at least high school. Also striking is the similarity of educational profiles between stayers and those remaining in the immediate local ("around here") region. This similarity holds for both men and women. Males who migrate into the local area actually tend to have fewer formal education credentials than their stayer counterparts. Women who moved into this same area had acquired slightly more educational credentials than their stayer counterparts. As expected, it is very clear from this data that those who migrated were much more likely to have acquired higher level credentials. The gender differential which is evident for most all forms and levels of education disappears at the university level.

Conclusion

Digby Neck is a coastal community which is losing a large percentage of its population to out-migration. However, out-migration is not a simple phenomenon. Residents of the coastal communities in which this research was conducted define migration according to a spatial geography that is connected to economic activity and social character of the region. In other words, while the "village" no longer exists as an economic and social entity that holds many individuals (particularly women), the local area "around here" does. Short range migrations are not considered to be migrations at all and indeed, the educational profiles of short range migrants are similar to those who stay on Digby Neck. Nearly two-thirds of the population studied here remained within the "around here" area, within 50 kilometres of Digby Neck. This shows that a majority of Digby Neckers remain within easy reach of their communities of origin and perhaps suggests that this coastal community remain quite resilient, albeit in a slightly larger geographic space. Improved highway travel in the past several decades may allow individuals to remain connected to their "home" communities while living closer to services, employment and recreational opportunities for their children. This may reflect fundamental changes in coastal communities which are now organised around small, remote service centres. The small town of Digby is the case in point here. It is a community of slightly more than 20 residents but it offers a wide and expanding array of services and large retail outlets which service surrounding villages. If postmodern social theorists are correct and contemporary culture is organised around consumption rather than production, then what I am describing here may be the incursion of consumerism into the rural margins.

Both male and female out-migrants from Digby Neck who move to the "not far" and "away" regions also appear to have acquired considerable high level educational credentials. Nearly one in three of these out migrants have university level education. This suggests that high school education in rural high schools may have been particularly beneficial for this migrant population. It is clear that a strong segment of this population did indeed "learn to leave"

Gender is clearly a factor in terms of understanding educational credentials. Predictably, women are much more likely to move from Digby Neck than men. However, women's migrations tend to be of shorter distance into the "around here" and "not far" regions. Women who stay on the Neck and remain within the "around here" region have acquired considerably more educational credentials than men. This reflects the higher levels of male resistance to formal education and their much greater work opportunities in the fishery which is the economic lifeblood of the local area. These tend to be opportunities which require little formal schooling. Since women cannot access many fisheries related jobs, they are required to obtain more formal educational credentials and/or move. Women, as a group, have more educational credentials than men reflecting local understandings of women's greater success in institutions of formal education. But these educational credentials probably tend to be put to use in family fishing enterprises as the data also show that forty percent of Digby Neck women list their occupation as "housewife." The differential between men and women's educational performance narrows with migration.

These preliminary findings demonstrate very clearly that education is linked to migration beyond the "around here" region. Migrants, both male and female have significantly higher levels of education. These findings also raise questions about the nature of contemporary rural communities which may remain able to hold large numbers of their "native" population because of expansion of transportation, communication and decentralization consumer services. However, in coastal communities, it is an odd rural renaissance' marked by continuing low levels of literacy (Willms, 1997) and poverty (Corbett, 20) in the case of Southwest Nova Scotia. What remains in this project is to explain the meaning of these differences in educational experience and arrive at an understanding of how it is that individuals from each of these generational cohorts came to have the educational, work and migration trajectories they did.

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Table 1 Historic Population of Digby Neck Communities- Pre 1951 Census Counts for Digby Neck

	1871	**1881**	**1891**	**1901**	**1911**	**1921**	**1931**	**1941**
Population	1520	1504	1491	1593	1461	1507	1450	1502

	1951	**1956**	**1961**	**1966**	**1971**	**1981**	**1991**
Population	1360	1318	1234	1287	1285	1366	1055

Table 2 Percentage of Historic Graduates of DNCS Remaining on Digby Neck
(Note Percentages do not include deceased and unknown)

	N	Deceased Or unknown	N Revised	Digby Neck 1999	Percentage
Cohort 1 1963-1974	**306**	**25**	**281**	**73**	**26%**
Cohort 2 1975-1986	**236**	**12**	**223**	**65**	**29.1%**
Cohort 3 1987-1998	**214**	**5**	**209**	**66**	**31.6%**
Total (63-98)	**756**	**42**	**714**	**204**	**28.6%**

Figure 1 Interview subjects

			Cohort 11963-74		Cohort 2 1975-86		Cohort 3 1987-98	
	Male	**Female**		**Male**	**Female**		**Male**	**Female**
Stayers	**3**	**3**		**3**	**3**		**3**	**3**
Leavers 3	**3**		**3**	**3**		**3**	**3**	
Educators	3	9						

Table 3 Out-migration rates from Digby Neck, Classes of 1963-1998

	N	**N Revised***	**Around here****	**Not far**	**Away**
Cohort 1 1963-1974	**306**	**281**	**155 (55.2)**	**62 (22.1)**	**64 (22.8)**
Cohort 2 1975-1986	**236**	**224**	**144 (64.3)**	**53 (23.7)**	**27 (12%)**
Cohort 3 1987-1998	**214**	**209**	**137 (65.6%)**	**40(19.1%)**	**33 (15.8%)**
TOTAL 124 (17.4%)	**756**	**714**	**436 (61.1%)**	**155 (21.7%)**	

* Excludes deceased and unknown
**Includes people living on Digby Neck and those within 50 km.

Table 4 Out migration rates from Digby Neck by Gender, 1963-1999

	Male	(%)	Female	(%)
No migration	148	(41.5)	60	(17.2)
Local migration	103	(28.9)	129	(37.0)
Subtotal ("Around here")	251	(70.3)	189	(54.1)
"Not far" migration	40	(11.2)	99	(28.4)
"away" migration	66	(18.5)	61	(17.5)
Total	357		349	

Table 5 Education and out-migration from Digby Neck
The classes of 1963-1998(percentages in parentheses)

	No migration		Away migration	
Less than grade 10	40	(23.8)	5	(05.7)
At least some h.s	107	(63.7)	79	(90.8)
At least h.s. graduation	69	(41.1)	62	(71.3)
University	7	(04.1)	29	(33.3)
Total	168		87	

*Totals will not necessarily match column numbers because the at least high school graduation category also includes university and college graduates

Table 6 Education and out-migration from Digby Neck by gender
The classes of 1963-1998(percentages in parentheses)

	No migration		"Around here" migration	
	Male	Female	Male	Female
Less than grade 10	36(30.2)	4 (08.2)	22 (32.3)	10 (10.3)
At least some h.s.	66(56.2)	41 (83.6)	30 (44.1)	79 (81.5)
At least h.s. graduation	39(33.6)	30 (61.2)	23 (33.8)	70 (72.2)
University	5(04.2)	2 (04.2)	4 (05.9)	8 (08.2)
Total*	119	49	68	97

*Totals will not necessarily match column numbers because the at least high school graduation category also includes university and college graduates

Table 7 Education and out-migration from Digby Neck by gender
The classes of 1963-1998 (percentages in parentheses)

	"Not far" migration		"Away" migration			
	Male	Female	Male	Female		
Less than grade 10	14(31.8)	15 (32.6)	5 (12.2)	0		
At least some h.s.	21(91.3)	57 (83.8)	33 (80.5)	43 (93.5)		
At least h.s. graduation	17(73.9)	54 (79.4)	23 (56.1)	39(84.8))	University	8
(34.7) 21 (30.9)	14 (31.8)	15 (32.6)				
Total*	23	68	41	46		

*Totals will not necessarily match column numbers because the at least high school graduation category also includes university and college graduates.

Wastelands To Wetlands: A Unique Community Process

Richard Drake, Canada

Abstract

To more adequately address pollution control objectives, legislation in British Columbia allows local governments to develop Liquid Waste Management Plans (LWMPs). Unfortunately, a local referendum defeat prevented the development of such a Plan for the rural area of the Comox Valley on Vancouver Island. Unable to fund a traditional planning process, direct solutions could not be found in the larger Comox region. But, the dynamic, unincorporated community of Union Bay, within that region, developed a community-driven, "hands- on" public process. In this article, we describe the moulding of the "Made in Union Bay" planning process that is designed and implemented by the people whom the LWM Plan will serve. We explore the work of a multi-faceted community committee, where citizens sit at the table with local, provincial, and federal levels of government. We also describe the building of successful partnerships, use of bureaucracies and consultants as resources ("on tap", not "on top"); the garnering of innovative funding sources; and accessing of creative talents within the community. The "Made in Union Bay" LWM Plan is charting a course to use waste as a resource, creating economic wealth and social capital, using "living machines", i.e. constructed wetlands and/or solar greenhouses, to treat wastewater. The committee is convinced that enhancing the environment and treating sewage as an asset, not a liability, will be their proud legacy.

The Comox Valley in rural Vancouver Island has experienced an explosion of interest in environmental issues in the past decade. Changing lifestyle choices have driven many urban refugees to this area of outstanding natural beauty, bringing expectations of sustainability and protection of this asset. Tension exists between economic development and preserving the environment.

While many people move to the Comox Valley to experience the unspoiled natural environment, and the accompanying quality of life, these qualities are being rapidly eroded by the very people who come to seek them (CSRD, 1994). The development boom experienced in the Comox Valley has put considerable pressure on the existing water resources (Smailes & Day, 1995). In the last 5 years there have been 1,424 housing starts in rural areas (CSRD, 1995) , which require onsite wastewater treatment.

CV-CARE (Comox Valley Citizens for Action on Recycling and the Environment) has been involved in community-based public education, research and advocacy programs since its inception in 1989. In response to widespread fecal coliform contamination, the Baynes Sound Round Table (BSRT) was formed in 1994 to address the imminent closure of shellfish harvesting in BC's most productive shellfish growing area - Baynes Sound. As a member of the BSRT, CV-CARE became aware of the compelling evidence of septic seepage and raw sewage discharge along the Baynes Sound foreshore (Environment Canada, 1994a, 1994b).

In April 1995, CARE initiated the Sound Wastewater Solutions (SWS) Project, to investigate solutions to these problems. The project is a partnership with the UBC Institute of Health Promotion Research and is funded by the BC Health Research Foundation.

The SWS project has recognized that the stewardship ethic, in its nascent stages in the Comox Valley, needs to be nurtured by raising the community awareness of the problems and encouraging behaviour/ attitude changes which lead to remediation of the pollution sources. An ideal opportunity to further encourage this ethic emerged in 1997, after the failure of a referendum to develop a regional liquid waste plan.

Perched on the shores of Baynes Sound, Union Bay is small community of 1500 people, which has long been plagued with pollution from old and failing septic systems. In January 1998 a group of Union Bay residents who had supported the referendum initiated a community dialogue on solving this long-standing problem. Disenchanted with earlier planning attempts, they envisioned a grass-roots community-driven process whereby they could regain control of key community decision-making processes. CV-CARE has helped to facilitate and champion their efforts. The SWS team is also involved in monitoring the process of community development and decision-making in the hope of sharing lessons learned in Union Bay with other communities and jurisdictions.

The changing dynamics of community involvement in regional planning issues have led to a unique approach in Union Bay - where the citizens remain in control of their own destiny, wrestling power from governments, while simultaneously maintaining strong support from all levels of government - both philosophically and financially. Throughout the process, the focus of the participants has been on innovation via community consultation - to not only prevent sewage pollution using innovative technologies, but also to consider what is generally considered a liability (waste) and treat it as an asset (wealth). Their guiding principle has been "waste water to pure water - waste to wealth".

Background

The Comox Valley is situated half way up the east coast of Vancouver Island off the coast of British Columbia. Bordered by mountains on one side, and the ocean on the other, many visitors are attracted to this natural beauty, and settle here. The population of 55,000 is distributed approximately equally between urban and rural areas, with denser concentrations in the towns of Courtenay, Comox and Cumberland. Denman and Hornby Islands contain two distinctive communities, accessible by a short ferry ride. Baynes Sound lies between the southern portion of the Comox Valley on one side, and Denman Island on the other, and to the north, the town of Comox. Historically a resource-extraction based community, with employment concentrated in the logging and fishing sectors, the profile has changed rapidly in the past decade with a major population influx, moving here for quality-of-life reasons.

Shellfish Problem

Sound region is now closed . The current trend of increasing shellfish harvesting closures are viewed as an indicator of the environmental pressures being exerted on marine water quality (Environment Canada, 1991). Shellfish require a pristine growing environment to be safely consumed, and from the point of view of water quality, are considered analogous to the "canary in the coal mine"(Wees, 1995). As well, cross contamination of domestic wells (Swann, 1995) has alerted the communities of the Comox Valley of the threat to health, quality of life and property values posed by failing or inadequate septic systems (Smailes & Day, 1995). Levels of fecal coliform in water quality samples taken by Environment Canada in April 1994 led to the Pacific Region Shellfish Classification Committee recommendation of closure of shellfish harvesting from Base Flats to Deep Bay (Environment Canada, 1994). Fifty Five percent of the area available for culture in the Baynes (Editor's note: This sentence was apocopated in the original).

The Baynes Sound Round Table (BSRT) Local MLA Margaret Lord convened the BSRT in Spring 1994 as a solution-based response to the water quality crisis in Baynes Sound. The jurisdiction of water quality is shared between numerous government agencies who have overlapping mandates, which in the past has resulted in communication problems and a subsequent lack of coordinated response to problems such as that in Baynes Sound (Kerfoot, Thomas, & Walker, 1995). The multi-sectoral nature of the BSRT which includes representatives from local, provincial and federal government agencies, public interest groups and the shellfish industry, is considered a necessary approach in overcoming a lack of inter-agency coordination, and the fist step towards solving a community problem (British Columbia Ministry of Environment, 1993). The BSRT also realised that long-term mitigation would be difficult to achieve without co-operation of the community (Environment Protection Agency, 1991). Since its inception the BSRT has overseen numerous initiatives to clean up Baynes Sound, including CVCARE's project Sound Wastewater Solutions.

Research Rationale

Numerous reports link human health and water pollution from uncontrolled sewage (Canadian Wildlife Service, 1995; Cogger, 1988; Lawson, et al., 1991; Swensen, 1985). As a result of this threat to the public's physical well being, government regulators have taken various measures to protect the public from water-borne environmental contaminants. Environmental Health officials throughout North America (including B.C. and the Comox Valley) are continually developing more and more stringent guidelines to regulate the design and installation of onsite sewage treatment systems. This is in response to widespread failures of systems in areas (particularly waterfront communities) where the soil's capacity to treat effluent has been exceeded (CVEC, 1993; Dotson, 1981; Duda & Cromartie; 1982; Penfold, 1993; Rabnett, 1989; Swann, 1995).

The British Columbia Ministry of Health has adopted the World Health Organization's definition of health and acknowledged that the health of British Columbians is determined by many factors including the physical environment, biological influences, employment, social support networks, and the ability to affect changes in each of these realms (empowerment) (British Columbia Provincial Health Officer, 1994). The government of Canada acknowledges that the health of the environment and people are inextricably linked (Environment Canada, 1990, 1995). Many government agencies, as well as environmental groups, have determined that it is necessary to empower communities to improve their environment, lifestyles, and economic conditions to improve their health (Israel, et al., 1994; Lewis & Collier, 1987; Miller & Keane, 1987; Thomas, 1992).

The BC Ministry of Health has recognized that delivery of health promotion education needs to" involve end-users in planning, design, implementation and evaluation, where the process of developing the plan is equally important as the end product. This new way of working will become the standard way of doing business in the future"(British Columbia Ministry of Health, 1993). Furthermore, local people have specific knowledge that can improve decision making, and can therefore bring accountability closer to home (Pinkerton, 1991).

There are engineered and behavioural change solutions to mitigating water pollution. The EPA (U.S. Environmental Protection Agency) highlights the need to replace conventional "end-of-the-pipe" solutions to water pollution by a "holistic, locally-tailored approach" which "must become a routine process for protecting and restoring water quality" (EPA, 1991). The traditional regulatory approach to waste management, which has attempted to deal with pollution after it occurred, needs to be replaced by a stewardship ethic, in which the emphasis will be on pollution prevention (Environment Canada, 1995) and involving all stake-holders in an open and consultative approach to environmental protection (British Columbia Ministry of Environment, 1992; Determan, 1995). The BC Ministry of Environment concludes that effective stewardship depends on an informed public that appreciates and understands the importance of water in their lives, and are willing to protect it (Pinkerton, 1991).

The outcome

The SWS project has been involved with the Union Bay community in a community mobilization process addressing waste water issues in the region. Two years into the community consultation process has seen a commitment of thousands of volunteer hours, and an emerging plan that promises to herald a new era for liquid waste planning - both from the consultation process and the actual tangible, physical outcome.

Initial research into the effects of the involvement by the Union Bay residents demonstrate that they have had a significant impact on the decision-making process. Their successful collaboration with all levels of government beauracracies has been such that other jurisdictions are looking at the Union Bay process as an example worth copying. The NIMBY syndrome is being replaced by YIMBY - a radical departure from the traditional approach to situating sewage treatment plants, which often causes strife and disharmony in a community.

The direction that the community hope to pioneer is to take the raw material - sewage - beyond the conventional steps of collection, treatment and discharge. The Union Bay approach seeks to beneficially utilise available waste for a number of different positive purposes, thus potentially stimulating the local economy. For example, the community is exploring the sue of constructed wetlands to treat sewage. This technology is recognised by many as an effective and ecologically sound method that can simultaneously enhancing the beauty of an area. In the case of Arcata in northern California, the Arcata Wildlife Sanctuary is actually a series of sewage treatment wetlands on a site which was formerly occupied by a landfill that had been leaching into the nearby Humboldt Bay (www.humboldt.edu/~ere_dept/marsh/history.html).

A series of constructed wetlands will be the main focus of the Union Bay plan. The community envisions using these wetlands as a significant tourist attraction. This has been the outcome of the Arcata experience, where 150,000 bird-watchers per year visit what is effectively their sewage treatment plant. Ultimately the Union Bay wetlands will serve as the centrepiece for a larger development featuring local businesses that can utilise waste byproducts, such as nurseries that may use composted sewage as a soil amendment. This approach is identical to that recently funded by the Canadian International Development Agency in the Jordan Valley (www.komex.com/cida). In this classic example of community development, the raw material - septage - will be turned into a valuable end commodity, providing a net gain for the users.

Observations and research conclusions

The Union Bay experience offers important insights and potential lessons that may be of value to other communities in addressing water issues. First, it is clear that the majority of community work continues to be done by relatively few people with little participation by specific segments of the community (e.g., youth).

Next, we can see that the collective experience and expertise of community participants is considerable and represents enormous "social capital" that can be tapped into. The community members bring financial expertise, adult education skills, communications skills, managerial expertise, artistic skills, and knowledge of the area's geography and economic profile. They also have extensive administrative, managerial, and professional skills. It is clear that community members bring a vision of a preferred future to the committee. This perspective could provide an important template for community resiliency; particularly, in resource-based communities that are seeking to identify and develop and a new type of economy.

Third, the community development process has clearly resulted in a shift in the roles and responsibilities of the government advisors that are involved through their paid employment. The advisors are "on tap, but not on top." They have to walk a fine line between being enforcers of legislation and supporters of a community process. Several of them expressed the adjustments they needed to undergo to be advisors, not directors. They provide important training and advice on how to proceed through the various steps of the planning process. They also access outside information and experts to inform the committee. The Union Bay process suggests that it is possible to create a win-win situation for both the community and professional participants. Experts and government representatives can gain by contributing to solutions at a community level rather than working with individuals. They can also educate the public about their area of responsibility.

The approach taken in Union Bay is one of 'negotiated compromise' between the community and the government. It remains unclear how further key constituencies (e.g., the general public, developers) will be engaged and how their involvement may affect the process and outcomes of the community process. This process highlights the tension between an open consensual approach to community decision making on one side and the need to make task-focused, technical decisions.

Union Bay provide a 'living laboratory' for exploring and better understanding the importance and value of 'volunteerism' as a resource for community building. It is also important to recognize the limits of volunteer participation and the fact that the community must be supported with appropriate technical and financial resources. While the decision-making process (e.g., community meetings) appears to work reasonably well, there is an ongoing opportunity to explore additional ways of engaging the community and making decisions through a wider range of strategies (i.e., community forums).

It is clear that the Sound Wastewater Solutions Project generally, and the Union Bay process more specifically have resulted in a process of mutual learning and capacity-building. The process and outcomes of this work are highly consistent with the tenets of participatory research which suggest that the research should lead to the creation of new knowledge, the development of a process that is educational and capacity-building, and an outcome that contributes to meaningful change in the community. The Union Bay Committee has benefited from following the principles of Canada's National Round Table on the Environment and the Economy; while at the same time developing an organizational structure that fits with the community. Similarly, the committee is following a planning process defined by the Ministry of Environment, Lands and Parks for local governments to development Liquid Waste Management Plans and adapting it to their needs. This committee is the first community group in BC to prepare an approved liquid waste management plan. Usually, the Regional Office of the Ministry of Environment, Lands and Parks negotiates the plan with the local government who then hires a consultant to keep the planning process on track and to write the reports.

The committee struggles with the degree to which they may claim to be 'representative' of the broader community. They attempt to maintain an inclusive, inviting and open process but are aware of the need to engage more citizens in the decision making process. The Union Bay project demonstrates that communities can be both effective and efficient in their use of resources. The committee completed Stage 1 with $1,000, a stage which normally could cost $30 - 40,000. They have found funds and support in government agencies and businesses that do not usually contribute to liquid waste management planning. For example, the Credit Union donated the time of their CEO to the committee and he is responsible for financial management.

The Committee has experienced the need to coordinate their activities with other groups in the area. At times, this has led to tension with other community groups engaged in planning a Local Area Plan (LAP). Over time, there remains a need to clarify the potential coordinating function of the Regional District government and to ensure that both committees do not spend needless time in resolving conflicts around their respective visions for Union Bay. CV CARE has played a crucial role in facilitating the work of the committee, organizing public events, gathering information, providing skills and expertise in committee development, finding funds, and taking on politically neutral roles when needed. They have built connections between the LWMP and other groups. They report to the Baynes Sound Action Group on the LWMP activities and have brought other communities (e.g., Cumberland) into the Union Bay process.

Summary

In summary, the outcomes of the committee's activities are complex. The members are learning in many ways. They are learning from each other. The advisors are learning how community members can effect change and community members are learning about sewage treatment systems. They are learning how to work with other community groups in Union Bay to build a common vision. They are sharing their knowledge with groups outside Union Bay; the community members by talking with other people, and the advisors by providing direction to other groups. On a larger scale, the committee shows innovation in their resource use. They look to an independent community group for guidance in reaching consensus, to help focus on their task and prepare their vision statement. The committee work has produced a shift in resource allocation. They are using government funds not usually slated for planning liquid waste management systems. The time the committee spends in planning will in the long term reduce the time that government staff will have spent in either planning a liquid waste management system, or in managing the results of not having a plan.

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Community Development Panel Discussion

John Bryden, Hal Gerein, Bill Reimer, Brandon Hughes

This seminar, specially organized to bring together representatives of the Ministry of Community Development, Co-operatives and Volunteers with delegates representing the Canadian Rural Revitalization Foundation (CRRF), the Canadian Rural Partnership (CRP), and the Arkleton Centre for Rural Development Research. Individuals from each of these organizations were instrumental in designing the afternoon long session so that the Ministry could present its work and a description of its mandate in anticipation of responses from the CRRF, the CRP, the Arkleton Centre, and individual conference delegates. These responses were planned to represent views from a provincial, national, and international perspective. The session was moderated by Professor John Bryden (Scotland) from the Arkleton Centre, and was summarized by Dr. Toni Haas (USA) of the Annenberg Rural Challenge. Approximately 100 conference delegates attended.

Edited transcripts of invited presenters follow this paragraph, which are in turn followed with summaries of presentations from delegates in the audience.

Edited Transcripts:

Dr. John Bryden: Good afternoon ladies and gentlemen and distinguished colleagues. We have a pretty tight agenda this afternoon and we're going to start with a session which will last about an a hour and forty minutes. The agenda is organized as follows:
Dr. Hal Gerein, Deputy Minister of Community Development in the BC government is going to start us off with a talk about issues in BC, in rural BC, the needs of rural BC, and the mandate of the ministry. This will be followed by a national response from Dr. Bill Reimer of the Canadian Rural Revitalization Foundation, then a provincial response from Mr. Brandon Hughes of the Ministry of Human Resources, and myself with some European thoughts. This will be followed with input from some members of CRRF. I think we have about 6 presentations and of about 5 minutes each. We will then have some comments from Arizona, (Dr. Emilia Martinez-Brawley) and Professor Tom Tiller from Norway.

After coffee, Dr. Toni Haas will provide us with a report on what we have discussed in the first half of the session and then we will get into a participatory debate involving all of you in stories and discussion, which will help us towards our agenda which is to bring our experience to bear on community development issues in BC, which the BC Government are grappling with, and what experience we think we can bring from the different parts of Canada, Australia, and Europe, and what advice or thoughts we can bring on good practice or bad practice in this area. That will be followed with a summary from our rapporteur once again, and if time allows a panel response to that, before we close at 4:00 P.M..
I would like to start with Dr. Hal Gerein and the BC issues.

Dr. Hal Gerein :

Good afternoon. I would first like to introduce Rupert Downing from the Ministry. Rupert collaborated with me on these notes and will be around for the hard questions that follow the presentation. I'll do the easy ones. My ministry is here to listen, to share and to learn. This morning's sessions and Dr. Bryden's introductory remarks have helped to set the context for this afternoon's session, which asks national and international experts on rurality to focus on rural BC. This is a unique opportunity and it's why we're here. Each of us has a perspective on what's happening in rural BC, and how to achieve our policy goal of building healthy and sustainable communities. In the next 15 minutes or so, I'm going to sketch for you a picture of the key transient pressures and the community development challenges that face us. We'll give you a brief overview of the purpose and responsibilities of the Ministry of Community Development, Cooperatives and Volunteers and then sum up with community priorities; "a call to action."

Almost half of BC's four million people live outside of Greater Vancouver and the capital region. This random dot density math illustrates the distribution of population across the province. Each dot represents 50 people, so we're on the map today. The concentration in Greater Vancouver, as you see on the map, the capital region around Victoria and the lower area, the Okanogan and the central northern corridors, and the coastal settlements as well as are illustrated. The settlement pattern in the province has emerged largely based upon historic natural resource development and natural advantage, rather than from a human settlement strategy.

Although the resource sector has been a historic and organizing factor around human settlement, the sector has declined in provincial significance from 17% of BC's GDP and employment in 1984 to 12% in 1997, as the graph indicates. While resource sector employment is declining in relative, and in some industries, in absolute terms, these are jobs in rural BC. Employment in the manufacturing, construction and service industries, and the new economy is growing. These new economy jobs are disproportionately located in BC's urban areas. Resource industries, however, remain dominant in many rural and coastal communities. The economies of Port Alberni, Terrace ,and Campbell River, for example, are 40% dependent on resource industries.

The math on this slide illustrates the dominant basic sector as measured by the income generated by the sector within BC's regional districts. Of note here is the degree to which forestry, minerals, mining (which includes oil and gas) and fishing continue to dominate the region's economies. This next slide illustrates the economic diversity of these same regions, the most diverse being the lighter shaded areas, and the least diverse the darker areas. The darker districts are those that are the most vulnerable to dramatic economic events caused by changes in commodity prices and global markets. Interestingly, the highest levels of socio-economic stress are concentrated in resource and rural communities. The unemployment rate is 4% higher in the Cariboo than in Vancouver. This 1999 map, again going from light to dark, with increasing unemployment, shows Vancouver with an unemployment rate of 7.8%, which is below the BC average and slightly above 7.6%, the average for Canada. Per capita income in some of the rural regions is as much as 20% lower than the BC average. Infant mortality in some regions is as much as double the BC rate. 50% of youth in some rural areas don't graduate from high school by age 18, compared with 30% for BC overall. However, these are relative measures, signaling a relative decline or a lesser state of well-being in our rural communities. These trends, or pressures, present a number of community development challenges.

Before we talk about these challenges, I want to provide you with two definitions. By community, we mean an area or locality where the body of inhabitants or residents has common economic, social and environmental interests. Second, by community development, we mean action by people locally to enhance the socio-economic, and environmental conditions of their communities on a sustainable, inclusive basis.

What then do we see as a community development challenges? The first challenge is community adjustment. Rural and resource dependent communities affected by sector decline require assistance with diversification and social development. The assistance provided by government should be coordinated, strategic and timely. Second, there is the challenge of integrated growth management. Rapid growth and recovery, that is change from a resource economy to a service economy, can challenge physical and social infrastructure, requiring social, economic and environmental planning and investment. Policies of rural stabilization can counter urbanization pressures. Third, the incidents of urban and rural poverty continues to be high. Community development and community economic development needs to reach those with the least assets. Fourth, over 90% of the land base in the province is crown land, most of which is allocated to industrial extraction of resources, with high corporate concentration.

The communities lack access to and management of the crown resources that surround them. An example here is the village of Bamfield that is located on the west coast of Vancouver Island, surrounded by forest lands. At a recent meeting in Bamfield we were told that not one person from the community is employed in the forest industry. The timber forest license is managed out of Port Alberni, an hour or so away and this is where the forest workers live. First Nations and community partnerships have recently successfully competed for a community forest license. The community is also adjacent to a traditional fishing resource, but with recent resource declines, has only two licenses held locally, but for rights that exist 100 kms or so around the north end of the Island.

The fifth challenge is access for capital for community economic development and diversification and it is limited to outside greater Vancouver and Victoria. New investment vehicles are needed. Sixth, BC is experiencing increasing cultural diversity. We must find ways of achieving inclusive communities. Seventh, unresolved treaty and land claims –new partnerships between Aboriginal and Non-aboriginal people, are critical to the future development of many communities. The eighth challenge is environmental sustainability. The depletion of the resource base and environmental degradation impact on long-term community sustainability. We have to make a transition to a new economy and definitely to a greener economy. The ninth challenge is community empowerment, the devolution of authority and tools to communities and overcoming centralized decision making and governments stove-pipe barriers to community development.

Briefly then, the Ministry of Community Development, Co-operatives and Volunteers was created, less than a year ago, to lead a response to the needs of rural and coastal BC and to contribute to the building of healthy and sustainable communities. Our mission is to support and invest in communities. We do this through five centres of activity and programming: (1) community development, (2) community transition and adjustment, (3) community enterprise, which focuses on economic diversification, cooperatives and volunteers focusing on building the social economy , and (4) community and inter-governmental relations, research and strategic initiatives, such as our participation at this conference. Our partnership efforts are inclusive and supportive of community leadership. We have an annual budget of 23 million. Last, (5) community priorities – a call to action. Based on the key trends and pressures, our consultations and the challenges before us, our ministry is embarking on a course that will see us pursue four principle policy thrusts that will establish a new relationship between communities and the province:

1. Communities will be able to enter into community adjustment agreements with government. The province is just concluding such an agreement with the village of Gold River following the closure of their pulp mill. The province has also entered into an adjustment planning process with Tumbler Ridge, following the announced closure of their largest coal mine, throwing some 500 employees out of work. In the Cariboo, a region suffering from high unemployment, the province has entered into an economic diversification fund management agreement.

2. Communities and regions who have done their planning and analysis will be able to form local community development corporations to create and implement socio-economic, development and diversification initiatives.

3. Special new development financing vehicles will be put in place for access by communities to raise their own capital and direct it into rural community infrastructure and locally controlled business development. These vehicles will supplement existing community venture capital corporations and community futures development corporations.

4. Access to community managed crown resource tenures will be provided, or at least some sort of revenue sharing. This policy initiative will bring an equity of opportunity to rural regions and communities to move to self-reliance, health and sustainability. Current vehicles employed by the province to these ends include, for example, First Nations claim and treaty settlements, the Columbia basin trust, which is based upon water right revenues, fair share in the Northeast, which is based upon oil and gas revenues, and community forests. The combination of these four policy thrusts are seen as being key to a new relationship between government and communities and to a vibrant, sustainable BC.

We would very much welcome feedback from the panelists and the audience in developing and advancing these policies and initiatives and I look forward to the discussion that follows.

Thank you.

Dr. Bill Reimer

As you may have heard from my earlier discussion a lot of the initiatives that you are undertaking sound very exciting. They fit quite well with some of the initiatives and directions that we anticipate. There will be a chance for other people in the CRRF to provide feedback. I'll take a short time to focus on a number of issues that we feel are challenges. They're a slightly different modification, but I think they illustrate some of the issues that have come out of our own research. The four challenges I'll talk about are the following: (1) an economy that drains rural economies, (2) conflicting government mandates, (3) operating modes between the rural communities and the government that are in tension, and (4) uncertainty. I will focus on those four challenges and will then briefly mention some of these issues and talk a little bit about some of the responses that may be possible, with a particular focus on provincial governments in the framework.

Technologies are labour shedding, as I mentioned this morning, and some of this will be repetitive. Economies are national and global, and are driving rural situations and therefore creating significant challenges. There are few mechanisms available for local communities to capture economic grants and for those that are involved in those economies this is a major challenge. When I'm talking about conflicting government mandates here, the rural agendas are different across departments within governments. Most of us are familiar with that and across levels of government (federal, provincial, municipal) mandates or agendas are different and this creates some problems. There are tensions between the ways in which people in rural communities operate and the way in which governments operate. Rural communities have traditionally been based on what we call associative and reciprocal kinds of relationships with some market-based relations, whereas government have their constraints based around the operation of bureaucracies, and laws and legal ways of operating that are to some extent conflicting and maybe even inconsistent with how local communities operate. The relative power of these two groups has meant that rural communities and their organizations have had to learn how to deal with bureaucracies and very often it's not the other way around, where bureaucracies have attempted to deal with associative and reciprocal relationships. The fourth challenge, with respect to uncertainty at the local level, I've mentioned earlier this morning. The weather, for example, is no longer the major source of uncertainty. The weather is insurable. The major source of uncertainty now is changing entitlements and regulations. It becomes very difficult, because these are often fashioned by outside sources, for local organizations to respond to those and anticipate them and they are certainly not insurable.

Some of the responses that we are entertaining in dealing with some of these challenges are, first of all, getting out of the commodity business. That is that governments have traditionally done within the Canadian context. I believe it's similar with our Australian colleagues; they have been closely tied to commodity trading and control, on a kind of mercantile arrangement and this has interfered very often with the ability to respond to community level concerns because those very economic concerns have been contributing to the decline of populations, if not other considerations, in rural communities. A second response is institutionalizing collaboration between departments. Right now, governments have separate departments. It's nice to see how a department of community development, cooperatives and volunteers is a sign that there is institutionalization across departments. We feel that exploring those options, short of getting rid of sectoral based departments completely, is a nice direction. The other point has to do with the reduction of bureaucratic traps for communities and groups.

I'll say a little more about that. We have conducted a study on voluntary associations and we find that there are a number of insights that come from asking local groups and organizations what the problems are that they face in dealing with governments. A number of those are what I have identified as bureaucratic traps. One of them is the necessity of governments to work with short-term, vs. long term budgets constraints and programs. Associative and reciprocal relations that we find predominating in rural communities are long run. They need nurturance and they develop over a long period of time. It's very difficult to fit those into the short term demands of the government and other bureaucracies. Too much volunteer energy gets burnt out on formulating proposals, applications, evaluations and so on. Some ways of trying to get around that is an important issue. One way is to broaden the criteria for accountability beyond treasury department criteria, including more types of events and activities, rather than those that produce specific products: fairs, recreations, celebrations, other forms of exchanges, clubs, associations, and development of media. Those are the kinds of things that go toward developing and enhancing the organization within communities. I remember when we moved into a small community in Quebec how it had a special event once a year where they welcomed newcomers. They even sent us godparents who ended up finding out about us and introduced us to the community. In a society that is more mobile those kinds of activities become very important, finding new ways of integrating newcomers into the area.

With respect to the accountability, which obviously bureaucracies have to deal with, it may be very important to pay for those. If the bureaucratic concern is with accountability, and it's not necessarily the concern of the local groups, then presumably it should be the bureaucracies that pay for them. People who join voluntary groups, or even develop enterprises are not there because they like to write proposals or provide accountability. One of the key issues in organizations was membership. Organizations can be attractive, but if their energy is spent providing proposals and filling out forms, something will be lost. The kind of movement on the part of bureaucracies to accommodate the ways people in local communities operate will be very useful. Also, within the framework of providing broader criteria for accountability, supporting the idea of multi functionality is a very important one, both at the local, regional and international level. It recognizes things like heritage, environment, and social policy as an important ingredient in the economy. Building local capacity is an issue that we are focusing upon, attempting to see the kinds of ways in which we can contribute to building the ability of local organizations to self-organize. It means empowering local organization over centralization. Some of the initiatives you mentioned about community development groups are very important initiatives along those lines. Looking for new forms of corporate organization at the local level is important. Building flexibility to respond to the complex and changing conditions encouraging and supporting variety in economic and social activities is, to a certain extent, the way to deal with uncertainty to ensure that we've got a variety of different things on the table, some of which may succeed and some which might not. The encouragement of variety itself can be seen as an objective that can possibly help to search for new ways of organizing and coping with the uncertainty that people face. Building multiple skills and infrastructure is another element that we are exploring. For example teaching community people how to deal with bureaucracies and aiding them in that process. Those bureaucratic arrangements are aspects that will be increasingly important for the future. I will stop at this point, since I've had a lot of opportunities to put things on the table.

Mr. Brandon Hughes:

I work with the Canadian Rural Partnership Program and as a partnership my position is actually cost-shared. I work half time for the Human Resources
Development in Canada and also half time by the Rural Secretariat in Ottawa. I'm here today to represent the Rural Secretariat. The other fortunate thing for me is that I live
in a small town in the interior, Nelson, BC. I'm a long way from both of my bosses, which is quite advantageous to myself. In that vein, I have a few tips on country living which might be useful to you if you don't come from a small community:

1. Goats are better than a weed-eater and sheep are better than a lawn mower.
2. One good barn cat is worth two dozen mouse traps.
3. A note to clean freaks., after two months the dust reaches an equilibrium, and doesn't get any worse.

I'd say I know that that's true, but my wife would kill me. Anyone who's connected with Human Resources Development knows that we've had some difficulties recently. Here's a good piece of advice on weathering a scandal: let it blow over, it's only a matter of time until someone else's skeleton falls out of the closet. So let that be fair warning.

I want to talk about the Canadian Rural Partnership Program and in that guise talk a little about communities and community development and some of the stuff that we're working on in this Federal Initiative and it certainly relates well to some of the comments that Hal made earlier. We have been working closely with his ministry and appreciate the support and good relationship we have with that level of government. It also relates well with some of the remarks Bill made. I'm going to talk a little bit about our program and a little bit about some of the challenges.

The Rural Partnership Program is a four year program to help the Federal level better identify and address rural development issues. What we're trying to do is find better ways of reaching out to rural communities. Federally we've cut back and centralized some of our offices. We are not as present in rural communities as we once were. We're trying to address that, find out what the issues are and also in line with some of the comments that Bill made about the challenges with rural communities and working with governments. We're trying to work more seamlessly with communities and try and save them some of the effort of trying to develop different proposals for different departments who have different mandates, forms and claim processes. That's quite a challenge for them.

We're fairly flexible in what we're talking about, and it's not necessarily farming communities, but communities that are outside of the major urban centres in BC. I was at a meeting with Nat Olson who's also here with the Rural Secretariat in the NWT. People were talking about what defines them as being rural and someone commented that too often rural communities talk about what they're not, rather than what they are. That's often true. Not being an urban area defines us as being a rural area. What we're trying to do with a number of components is identify what the issues are and engage citizens at the local level. We're trying to test out new approaches and share best practices based on the information that we've learned. We're forming rural teams that represent different federal departments and ministries as a support network for rural areas. We're trying to ensure that at the federal level new policies are looked at through a rural lens so that we ensure that it's workable and relevant for a rural area when new programs and policies are introduced. We're also gathering more intelligence on rural communities. Ray Bollman is here at this conference, and is partly responsible for that area. We started off with an interesting process, the results are on our website. Also we have many hand outs at our exhibit next door. We started out with a national dialogue with input from over 7000 Canadians in every province and territory on issues they felt were important to them. Of course government often uses consultation process, but what was unique about this one was it was broad reaching and national and started from the perspective of asking rural Canadians what their strengths were in their communities, what their challenges were, what could be done and who should be involved. ie. how we could address it? It didn't say that the government will address them or that the citizens were on their own, but how we could work together in a more seamless fashion to address these issues. What came up was that people do not necessarily distinguish between different levels of government, they just want help, not always in the form of money. Sometimes it's just in the form of other kinds of support. There are over 1000 people involved in BC and the end result was a national workshop in Belleville, Ontario with a really had good discussion about what those priorities were. This is where there's a lot of validation with what Hal was saying. People were talking about the lack of access to information on programs. They don't always know what programs exist, if there's money there, and if it's relevant for them. The issue of rural youth feeling there's no opportunities for them and an out-migration of rural youth from those areas, which we think is quite critical. Community capacity building is something that's been mentioned. The economic and social stresses that are occurring in rural communities has put a lot of stress in those communities and there's been out migration of some leaders, and a burn out among the leaders that are left. It's incumbent upon us to work together at different levels of government to build that leadership. People are certainly willing to find their own solutions, but sometimes they need support from government to do that. Sometimes that support is just in terms of having a facilitator, a catalyst and a trainer to help revitalize those leaders and mavericks in the community. What about the Information Highway ? Briefly, I was involved with a project that was funded through the Canadian Rural Partnership in the Nelson, Slocan, Salmo areas (outlying areas of the Kootenays). We wanted to provide people the opportunity to access distance learning without having to necessarily to go a large community like Nelson. Nelson is a relatively large community of 10,000 compared to a community of less than a thousand like some of the outlying places. What we felt we would do is provide people with computers in their homes and they could get some of the information via television and we would have some of the instructors move around to the different areas so the training was outside of Nelson itself. The challenge we found was that some people had party lines, some people didn't have TV's and some people didn't have cablevision. A lot of people didn't have access to public transportation or any transportation and when the weather was bad they couldn't get from one place to another. Even myself, living in the area, didn't anticipate some of these challenges. We need to work in terms of providing better access to health care. In urban areas in BC the ratio of doctor to patient is 1/200, and in rural areas it's 1/800. But then someone from Brisbane explained to me that that would be a good figure in Australia. There's a relative discrepancy there between rural and urban areas that I was trying to get at. Access to education is another issue. This is a nice facility that I wish we had close to Nelson. There are a lot of communities. If your son or daughter wants to go to post secondary education, they have to go a long way from home. You have the extra cost of accommodation, food, lodging. Those priorities are part of a federal framework for action on rural. It's important that the federal level has committed to action and will be presenting annual reports to parliament and therefore to the citizens of rural Canada as to how we're doing on these things in addressing some of these issues.

We've been testing some solutions with pilot projects. We don't have a lot of money there compared to other ministries. Our money is meant to be seed money and it tends to leverage 5 or 6 dollars from other federal, provincial levels of government for every dollar we put in. I think what's useful is that there are not a lot of rules around them because people in rural areas told us there were too many rules and we needed more flexibility. So that's allowed us to test some different approaches and we've had some good luck with that. We're working on the concept of a virtual call center, which would allow call centers to be in a rural area and people could work from their own homes and take calls, to reserve for hotels, or Sears, or whatever. We think that has a lot of potential, if we can show there is the talent in these communities that can take these jobs that will be very helpful. Another idea we've been working on is there are a lot of artisans scattered across BC that have very good talents and have produced great goods, but their market is very limited and no one knows about the stuff they have We had a project where the community futures in the Peace River area would purchase in large numbers the goods the artisans were producing and would market them through a large geographic area and use their retailing and marketing expertise to get input from retailers on what would sell well and what wouldn't. They've been able to give information back to the artisans as to what works and what doesn't. If you paint these green we'll buy a dozen more, or if you knock your price down you'll be able to sell a lot more. That's working well too. We have set up a structure to help support rural communities and help to get different levels of government working together along with rural organizations and as an example, that's co-chaired with Industry Canada and along with Hal's ministry, the network that's there is quite a powerful one and we're pleased that we've been able to build that kind of team approach to support those communities. We're piloting a project that's called Service Canada that's going to bring better information on programs and services to people in rural Canada. As an example one of the communities is in Lumby, heavily reliant on forestry is setting up sites in the village office, community center, and Chamber of Commerce, that will have a connection to a searchable data base of all Federal government programs, as well as a pathfinder who's trained in the programming that is available that can help them develop proposals, identify the programs available to meet their community needs and get access to the programs they need. We've been working with the provincial level with a government agent's office that has a network of 58 offices throughout BC to see if there are opportunities to expand this kind of approach, so that people wherever they are in the province are on a level playing field in terms of being able to access information on programs, whether it's the federal or provincial level.

Rural dialogues: we've had 7 meetings around the province just with youth issues, to try to identify why youth are leaving rural communities and what we can do about it. That's been very interesting. Some things we expected and some we didn't. They want access to education, and access to jobs that are in the information technology sector or that are more satisfying than the service sector jobs that might tend to be low paying or seasonal. And that are more satisfying to them than the resource extraction jobs. They are also very keen on being involved in their communities to make them better places in which to live. As a result of these meetings youth in some of the areas have decided to form youth councils and are dealing with the local municipalities to gain their support. We have also held 6 dialogue sessions for rural citizens in general. These have confirmed the priorities I mentioned earlier, access to education and health care, opportunities for youth, diversification, and community capacity building.

We have a CRP Rural Team in BC, as there is in other provinces, which brings together government representatives to develop joint initiatives to address these issues. The Team represents about a dozen federal departments, some provincial ministries, and some rural organizations. This forum should allow us to work more seamlessly with rural communities, helping them address their issues in a more co-ordinated way.

Summarized Responses:

Dr. John Bryden:

Spoke of a similar theme in Europe when discussing rural development. His work with OECD's LEADER projects featured::

- Local action groups with a bottom-up approach using local partnerships (NGO's in social, economic, and environmental spheres)

- creating local identity as a marketing tool, providing training, supporting innovative products and processes
- networking – learning from each other on regional, national and transnational levels
- creating a global grant mechanism, part of a 6 year development plan (the European Community provides a single money envelope) maintaining groups' autonomy as an important mechanism
- land reform, community ownership (who owns the land and to what extent ownership gives greater freedom for decisions), community rights and what happens to land (ex. forestry.)

John described what he calls the "New Rule of the State," featuring:
developing "joined-up thinking"

- reallocating resources
- ensuring good flow of information
- sharing information on initiatives and projects
- articulating clear over-arching goals of rural policy
- working for "synergy" between sectoral policies
- supporting research

John's work raises a series of questions, such as:
How to support bottom up reform from the top?
How will efforts to coordinate policies work? "Rural proofing" policies, produce a creative phase out of the analytic, data gathering phase?
Problems of partnerships, how to make transparent decisions, how to include representatives of all groups?
How to meet the challenge of getting "joined up" thinking from powerful ministries.
How to create networks that learn from one another rather than share ignorance.
How to evaluate the transferability of decisions, mediate context.

Shirley Dawe (Atlantic Canada Opportunity Agency):

Shirley presented a report on regional economic development zones in Newfoundland and Labrador (including sub-provincial zones). She spoke of the need for looking at successes, as little analysis of current success has been done yet. She spoke of locally identified strategic priorities (sole channel for all), how performance varies (increased federal and provincial dollars, coordination of services giving youth a voice in regional economic development planning, regional economic development in schools, basic skill building in job opportunities that exist), and how program content was developed after consultation and was based on zone priorities.

David Bruce (Community Development Society, New Brunswick):

David spoke of his Isle Madame's response to losing 50% of its employment base by establishing a local development association. This group identified strategic opportunities in aquaculture and tourism, encouraged small businesses, linked human resources with job creation, applied information technology training dollars in a community cable television station. He also reported on a provincial 1999 Rural Prosperity Conference which focused on building leadership capacity (including youth), creating new forms of community investment incentives, governance focus on block grants annually awarded for innovative community development projects. He saw this regional service delivery as a variation on the rural secretariat at a provincial level, and spoke of the appointment of a permanent rural citizen advisory council.

Thus, two noteworthy experiences from Atlantic Canada:

1. Development of the Isle Madame Association: A small community in south east Cape Breton was devastated by the loss of 500 jobs due to the groundfish moratorium in the early 1990s. Community members organized themselves and planned for a future without the fishery. They have replaced most of the jobs with others in tourism, communications, and small scale manufacturing. Their keys to success have been the development of a local investment fund, doing the training in the community instead of sending people away, and ensuring that there is a long term vision for their community.

(see www.islemadame.com)

2. Rural Development in New Brunswick: The Province of New Brunswick established a "Minister's Advisory Committee on Rural Prosperity" in 1999 to examine how best to position rural development assistance to communities. The ten-member panel came up with these recommendations related to decision making, leadership, and investment,:
    - establish a provincial rural secretariat based on the federal model
    - establish a permanent rural advisory committee
    - develop a regional service delivery model to address the problem of no representation at the local level for people living in unincorporated areas
    - invest in a comprehensive community leadership program
    - use the "block grant" funding model to provide a pool of community development money to each region; each community would submit business case proposals for access to the money for innovative community development projects
    - establish an appropriate tool for community investment, and provide the staff resources at the

provincial level to promote, assist, and facilitate their development in each region of the province

The recommendations have not yet been adopted as there was a change in government during the work of the committee.

Tom Beckley (Canadian Forest Service):

Tom presented case studies of two communities that purchased mills that were facing closure. Employees in Pine Falls, Manitoba, and Cabots Crossing kept their mills open, re-tooled them, and experienced minimal population and job loss. The social impact of mill closures concerned job losses, population decline, school closures, and loss of services. Initially all the risk was shifted locally, the employees were the buyers of last resort. The government played key roles in the buy-out, with explicit cooperation from the provincial government as mediator (transferring crown leases) and negotiator. The mills experienced significant management problems with the power shift to the employees.

Eventually both mills were resold to large corporations. Unexpectedly, employee-owners made large profits on their shares. One dollar shares in 1991 in Cabots Crossing were worth ten dollars in 1996, five dollar shares in 1994 in Pine Falls were worth 84 dollars in 1998.

Tony Fuller (University of Guelph):

(1) Direct help to communities (Coaching Received) Training, pulling community together was helpful.
(2) Recommend opportunity for reflection of what you have done.

Tony described the profound difficulty with communities sefl-organizing from the bottom-up. There presents an enormous potential dilemma for governments, in that they must be available, ready, flexible, on-hand, sensitive, patient and they need to develop trust. There are different requirements for accountability and different time frames. Tony recommended liberating government staff, emphasizing professional development in community development for staff in government to provide direct help to communities in training and pulling communities together. Reflection and analysis of experiences are hard to come by, and Tony recommended that opportunities for reflection on what has been done be provided.

Derek Wilkinson (Elliott Lake, Ontario):
Produce Uranium - Single-Resource Community. 1996
All Mines Closed

Derek spoke of experiences with Uranium producing Elliot Lake's mine closure in 1996. Elliott Lake was a single resource community in an isolated place. Derek used a dynamic multiplier model for analysis (base, secondary commercial sector, institutional sector) He spoke of a demographic transition in the community, with the healthier workers leaving, and how the community eventually developed and capitalized on non-traditional exports, tourism (different because people come into the town) based on cheap housing, good infrastructure, sound municipal funding, existing retirement population, job creation, and public works. He recommend the early announcement of closures and some insurance scheme for maintaining housing stock, and the need to develop facilities that will be useful after closures, to keep retiring workers prior to closures, and to keep a share of unemployed, disabled and retired workers.

Greg Halseth (University of Northern British Columbia):

Greg presented the Principles for Guiding Public Consultation Process that he developed over a three year process:

- The importance of Consultation (consultation is important, there is an obligation to consult)
- Clarity of Process (level playing field, clarity of mandate, clarity of decision-making powers)
- Involving the "Public" (publicity, valuing public input, recognize public involvement programs, understanding that interest groups are not necessarily the public)
- Information Throughout the Process (access to base data, information sharing as process proceeds, broaden consultation options)
- Process Management (open process, timelines)
- Cautions (most needed ingredient)

He also presented inter-linked themes recognized when looking at funding programs and the volunteer sector:

- lack of fit between program start dates and funding approval timelines
- no funding phase-out, funding often cut without warning to the non-profit organizations
- interim funding support needed
- more generic funding is needed to allow community specific programs
- non-profit organizations have difficulty preparing / conceptualizing five-year plans (or two-year plans)
- lack of clarity in the application process
- agency failure to recognize unique resource community needs
- coordination of application processes across all government levels
- recognition of successful events that community wants to continue as 'traditional events" instead of only funding unique or new ideas
- organizations feeling as if they must prove their effectiveness in the community in order to have their programs supported
- powerlessness

- proactive work is not rewarded
- lack of community skills to develop proposals
- lack of volunteer time to complete lengthy applications for funding
- failure breeds non-participation in the future
- specific needs of community groups

Dr. Emelia Martinez-Brawley (Arizona State University):

Emelia provided a perspective from the United States. She spoke of the need to ensure that "fringes are included to ensure variety and richness are apparent in debates, e.g., females, elderly people, for that is how reality will be perceived." She spoke how Debureaucratization is the major issue for linguistically, culturally, and racially / ethnically diverse rural communities . Definition of diversity indicators are entrepreneurial in nature / impact for small scale businesses and that there is a transfer of cost with out-migration. She particularly encouraged researchers to use stories to tell tales, and she was particularly moved by the efforts of Isle Mesdames.

Dr. Toni Haas (Rapporteur)

Building healthy and sustainable communities is a goal held in common by the communities, the non-governmental agencies whose mission is helping communities, and by the government on the province and federal level. For each sector, however, the issues are simultaneously the same the different.

There are at least two cultures at play here, that of the governmental bureaucracy and that of advocates for local places: researchers, policy-advisors, community organizers. Each has mores, constraints, goals and purposes. The heavy-duty intellectual and emotional task is bringing diverse agendas into agreement. The process by which that happens takes patience, understanding, and good will. Civility helps. Measured language is more useful than incendiary language (but behaving like a diplomat or statesman is seldom as much fun as tossing grenades.) When the momentum for working cooperatively flags, it seems useful to call back into prominence the shared principles that undergird the work.

The trend toward mutuality and converging agendas can't be taken too far. Birgit Jentsch helped us understand that we need to identify uncommon purposes as well. Her example was youth work policy and rural economic development policy, which are not always the same. Rural youth may need to leave home to gain broader perspectives and find work in areas where they have particular interests and gifts, rural development policy must then provide opportunities for them to return and find work in expanded economic opportunities in rural areas. We need to think about who is moving out of rural areas, who is moving in, when that happens in people's lives, and what they need in order to return.

An important perspective that is evolving is the notion of youth as resources, to their communities. Young people will have deeper ties to their home places when they feel valued, when they have opportunities to make contributions to their home places.

Organizations and people have multiple roles in rural communities. A theme of this panel, and of this meeting in general, is the devolution of power. People most affected by decisions must have a voice in making them. A second theme is the richness of multiple perspectives. We are learning together to embrace diversity, not only because it is the right thing to do (an acknowledgment of the principles we share) but also because it has practical benefits of increasing sustainability. The third emerging theme is the importance of basing advocacy on data, informed by observation.

There are issues of structure. Increasingly we are coming to understand that there are outside influences on rural communities that affect their sustainability. The globalization of the economy, national trade policies, transnational corporate decisions, all impact the lives of people in rural communities. The move is toward increasing self organization plus analysis of over-arching policies that address their effect on rural communities.

This work is complex, messy, and patient. It must be strategic and flexible, and will be most powerful when we build in shock absorbers for both sides. When governmental agencies take a long time to make decisions (the example was funding for tourism), and those decisions come after the major tourist season, local communities feel frustrated.

On the other hand, the careful decisions are intended to provide careful stewardship of public money on the part of agencies, and they need political cover to continue their work.

Partnerships, working together, building relationships is invisible, expensive, and essential work, that requires time, energy, and assumptions of good will.

The Role Of District Nurses In Caring For People With Mental Health Problems Who Live In Rural Areas

William Lauder, Scotland

Rural Nursing Practice

District Nurses in the Scottish Highlands and Islands have a somewhat different role than District Nurses in other more urban areas of Scotland. This group of nurses combine, in some permutation, the roles of District Nurse, Community Midwife, Health Visitor, and School Nurse. This complex role(s) brings them into contact with a wide range of mental health work with people across the age range. It should be bourne in mind that they are regarded as generalist nurses who do not deal specifically with mental health problems. The mental health work of Health Visitors in effectively treating post-natal depression is well recognised, but nevertheless the types of problems and the ability to respond to other types of problems by double/triple/quadruple duties District Nurses in a therapeutic fashion is not well documented. Our current research In the Department of Nursing and Midwifery, University of Stirling is exploring the factors, and the impact of these factors within the context of rural practice, which influence generalist nurses' ability to work effectively with mental health problems.

Therapeutic Commitment, Role Support and Role Competency

Shaw eta1978) proposed a model of therapeutic commitment to explain the factors which influence non-specialist workers' therapeutic commitment to working with people who have alcohol problems. In this study we propose a revised version of this theoretical model to explain the factors which influence the therapeutic commitment of District Nurses to working directly with people who have mental health problems. In their model Shaw et al propose that effective inter-personal interventions are dependent on the professional adopting an approach to clients which demonstrates warmth and empathy. It is proposed that the willingness and ability to utilise these therapeutic qualities is a function of therapeutic commitment. Therapeutic commitment is influenced by professionals' self-perceived role competency and role support. Role competency is a conflation of Shaw et al's (1978) concepts of role adequacy and role legitimacy. Role competency is defined as having the necessary skills, knowledge and understanding of whether patients with a particular problem come within one's sphere of responsibility. Role support is defined as the perceived level of contact and access, or potential contact and access, one has to specialist mental health workers.

Therapeutic commitment is essentially a humanist notion, the basic tenets of which have been widely articulated (Rogers 1957, 1961, 1975). Rogers (1957) suggested that certain core helper responses are necessary and sufficient for client growth. He proposed that specific techniques are less important than the facilitative conditions of therapeutic change. The necessary and sufficient conditions referred to include the helper's attitude, cognition and behaviour. Rogers argues that the client learns to change when the helper communicates unconditional commitment (warmth), non-defensiveness (genuineness) and if the helper is successful in communicating the client's current feeling (empathy). When a client feels secure in a nurse-client relationship they can begin to develop a trusting relationship. Trust is dependent on a clear commitment on the part of the nurse towards working therapeutically with the client. The research literature reveals that if helpers are able to reduce clients' feelings of insecurity by displaying high levels of therapeutic commitment successful therapy outcomes are more likely (Truax and Carkhuff 1967, Reynolds and Cormack 1990, Reynolds 1998). It is suggested that there is a direct link between District Nurses' therapeutic commitment, role support and role competency and the success or otherwise of any nursing intervention (Figure 1). Levels of therapeutic commitment and perceptions of role support and role competency of District Nurses to working with people with mental health problems in rural settings is not known.

Research Design and Method

This qualitative phase comprised a series of in-depth interviews with District Nurses with the expressed intention of describing their role, as they see it, in caring for people with mental health problems.

Study Aim

1. To provide a description of the care given by District Nurses to patients with mental illnesses and mental health-related nursing problems;
2. To describe the perceptions of District Nurses of the adequacy of relationships between specialist and generalist services.

Sample

The sample comprised a sub-sample of District Nurses (N=15) recruited as part of a larger study (N=82). All District Nurses were caseload holders who, practised in rural settings, and were responsible for the nursing management of a group of patients. All subjects were double, triple or quadruple duty nurses.

Data Collection and Analysis

Interviews generally lasted a minimum of one hour and were audio-recorded and fully transcribed. Data were analysed by two researchers using the procedures outlined by Taylor and Bogdan (1998). Researchers analysed and coded interviews individually and then compared results of the analysis looking for similarities and consistency in thematic categories.

Findings

Analysis of interview data revealed the thematic categories of community embeddedess; role support; role competency ; supervision and monitoring; gatekeeping.

Community Embeddedness

This theme although not directly concerning one of the central themes in the model highlights the context within which rural nurses work and which influences how therapeutic commitment unfolds. District Nurses appeared to be an integral part of the life of the community in a more extensive way than other health care workers. They live, shop and socialise as members of the community. For example, their children go to the same school as their patients' children. These factors allied to the shared social class expectation and outlook between the majority of the community and the District Nurses created a sense of embeddedness in the daily lives and routines of the community at large. The District Nurse was part of a large and complex set of informal networks which meant that she learned about individuals and their health problems from these networks.

District Nurses expressed the view that they are viewed by the community as a friend, someone who can be readily approached to discuss problems. This may be important since many people in rural areas can feel isolated. The District Nurse is aware of this aspect of rural life and recognises that her role provides companionship for some clients.

People know the District Nurse as she lives in the immediate locality, so a trust exists between her and the community enabling them to freely articulate their thoughts and worries.

District Nurses reported feeling an additional responsibility towards the community which went beyond their professional remit. It is suggested that District Nurses in rural areas may have to respond to complex social and family problems. Although District Nurses have accepted that patients see them as a friend and they may behave to a certain extent as a friend, some recognised the need not to become too involved in an overly friendly relationship. District Nurses displayed a tendency to conceptualise a problem in the context of the family rather than as a problem of the individual. Some District Nurses would add a relative to their caseload if they needed an intervention due to mental health problems of others. Some District Nurses would not formally add them to the caseload but would still respond to their problems. This is an example of hidden need as many relatives had mental health problems themselves as a direct consequence of their relative's problem.

Role Support

District Nurses' work is influenced by the current organisation of services. Changes in the nature of service provision impact on their work. One example of change in the operation of specialist services relates to a policy of the regional alcohol treatment unit. This unit has a policy of non-admission for people who are still actively drinking. This led on occasions to the patient beginning detoxification prior to planned admission. The District Nurse and General Practitioner were left to manage this initial procedure unsupported.

District Nurses often offer help in the form of referral to specialist services, assessment for household aids and extra visits but they find that some people refuse them due to financial implications or denial of their health problem. Although refusal of help may increase workload the District Nurse is careful not to 'rock the boat' and will continue to go along with what the patient wants to happen, avoiding the temptation to pressurise them into changing their mind. If the client chooses to reject the offer of help or referral to other specialist services/agencies the District Nurse is left to cope with the problem.

Often the District Nurse is relying on the patient provide this information since there is often no formal process for updating the primary care team. District Nurses are often unaware of actual medical diagnoses or medicine treatment. Specialist mental health services did not appear to put a great deal of effort into developing good relationships and lines of communication with District Nurses.

This concurs with information received from the subjects who reported an almost non-existent relationship with psychiatrists. Even when support was made available to them (usually from CPNs) this was usually perceived as being too little and too tenuous.

Role Competency

Treatment modalities were not well understood but it was clear District Nurses would offer support, advice, practical help and crisis management to people with mental health problems. They often did not feel competent to deal with mental health problems and would describe their intervention as a, "waste of time", referring to themselves as being, "out of my depth". There was also a perceived lack of skills necessary for helping people with alcohol related problems. District Nurses often felt guilty about visiting such people and often used vague terms such as 'supervisory visit' to describe, legitimise and document the purpose of the visit.

All of the District Nurses recognised the need to support the carer, however some put the carer onto their caseload whilst others did not. Time is spent speaking to the carer about their own needs and this can often be the main reason for the District Nurse visiting.

District Nurses reported having to deal with patients with a wide range of mental health problems who would otherwise be treated by the mental health team if they were living in a city. Due to lack of training and support many District Nurses feel unsure of how effective their efforts are when dealing with patients with mental illness, but nevertheless they continue to visit patients as they believe that they provide the only support many patients will have ready access to.

Supervision and Monitoring

The themes of supervision and monitoring and gatekeeping are manifestations of therapeutic commitment to working with people with mental health problems. The label 'supervisory' was commonly used to describe visits to people with mental health problems. These visits were for the non-specific monitoring of patients, often justified on the basis that the patients needs may change suddenly.

As a consequence of their multiple roles District Nurses can visit households for a variety of reasons and the frequency of their visits enables them to identify subtle changes in behaviour of any family member. Whilst in the home they are able to assess the physical and mental needs of the family and offer them support. The combination of the continuity of patient care and local knowledge enables District Nurses to identify family problems which may otherwise have gone unnoticed. District Nurses in rural areas are able to follow through a hunch that they may have about the health or circumstances of a patient. This may not be possible in urban areas where the change in behaviour may be too subtle for a 'stranger' to notice or because time constraints in the nurses' schedule do not warrant a visit based on a hunch.

Gatekeeping

The District Nurse is a key figure in the management of patient care. Patients were reported to be more at ease with District Nurses, finding them to be more approachable and less threatening than other professionals. This is similar to talking to a knowledgeable friend with the purpose of finding out the possible outcomes of a situation before deciding whether to consult others. Although District Nurses do not usually provide specific psychosocial treatments, such as cognitive-behaviour therapy, it tends to be the District Nurse who is in the position of being able to identify problems that would benefit from referral to a GP or a specialist.

Often the District Nurse would assess informally the extent of a patient's problem and then decide whether to manage this herself. The nurse would continually monitor the situation and if significant changes appeared, would then refer the patient to the general practitioner or specialist services. The District Nurse is able to use her knowledge and experience, together with the trust she has within the local population, to provide greater insight into local health needs.

Discussion

In terms of the explication of the District Nurses' role in caring for people with mental health problems who live in rural settings it has been shown that they do not fully understand what is clearly an extensive role in caring for people with mental health problems. The therapeutic commitment to working with people with mental health problems is evident in the themes of gatekeeping and supervision and monitoring. District Nurses acted as gatekeepers to services and would treat mental health problems independently, only referring-on when they deemed it necessary. They are ideally placed to play a direct front-line role in caring for mental illness within the context of community- and family-based responses. Included in this role are both direct-care giving, and also surveillance and monitoring functions. This role requires an approach in which their role is legitimised, in which support is provided, and which in turn increases levels of therapeutic commitment when caring for this client group.

The relationship between generalist and specialist services was not optimal and it was very revealing that District Nurses frequently did not know if a medical diagnoses had been made, and even if they thought one had been made they did not know what this was. It is suggested that this may require a reconfiguration of service provision in which the roles and relationships between CPNs and District Nurses are re-evaluated. It is proposed that a CPN, or similar specialist, should work directly with District Nurses, providing support, clinical supervision, and education with a view to increasing therapeutic commitment, role support and role competency.

The findings of this study may not be generalisable to District Nurses in rural areas as a whole, or may not be generalisable to specific rural areas, such as the Scottish Borders, with different community care arrangements. It is necessary to generalise with caution and to undertake further research on rural District Nurses throughout Scotland.

Implications for Health Care Providers

- District Nurses play a key role in the care of people with mental health problem in rural settings. This role is not fully recognised, supported and thus District Nurses' potential is underdeveloped. NHS Trusts require to explore how service boundaries can best be configured to legitimise the District Nurses' role vis a viz mental health problems.
- There appears to be a lack of shared goals and poor communication between specialist and generalist services. This may produce a fragmented and sub-optimal service.
- The problems nurses are required to deal with are difficult to measure and quantify as there is no common diagnostic language/terminology in current use to facilitate measurement and quantification. This impairs the strategic management of District Nursing provision.

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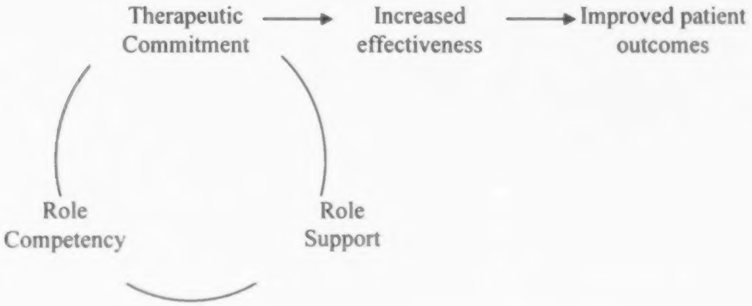
Figure 1. Therapeutic Commitment, Role Security and Effective Interventions by District Nurses



Alternative Banking Solutions For Rural Communities In Australia

Mike Oborn, Australia

Abstract

Australia is a highly urbanized nation with 86% of its population living in urban areas, most within 50 kilometres of the coastline, leaving regional Australia sparsely populated. To service this population a number of large national and regional banks with extensive branch networks have evolved. They peaked in size at around 7,064 branches in 1992, of which 2,906 were located outside the metropolitan areas of the State capitals. Since 1992 these branches have been cut by 22.6%, with branches in rural areas being reduced by 20.0%. In many instances, the closure of a branch in a rural town leaves the town without banking facilities, and unlike in the metropolitan area, the nearest alternative can be over 100 km away. With the closure of the last branch in a town, many locals do their shopping whilst banking in a neighbouring town, thus contracting the economy of a town following a branch closure. As a consequence, both State and Federal Governments have conducted inquiries into the impact of branch closures in rural communities and examined the alternatives available to these bank-less communities. This paper considers the submissions to these inquiries and some of the alternatives suggested, with a concentration on Australia's largest and most sparsely populated State, Western Australia. Whilst the banks see telephone and electronic banking channels as adequate replacements for a physical presence, their customers in rural areas are seeking more traditional contact-based solutions. This has seen the emergence of community banking for the first time in Australia and this paper examines them in some detail whilst concluding that despite their benefits, rural communities must come to grips with the newer technologies.

Since 1992 banks in Australia have heavily reduced their bank branches and staff across Australia. Whilst this impact has been considerable in the heavily populated metropolitan areas, it has been the small rural communities that have felt the impact greatest. Many of these towns had only one bank represented and when that closed, the impact was far greater than the loss of a few bank jobs in the town. Consequently the Federal Government and two State Governments have conducted inquiries into the impact of these branch closures.

This paper presents the statistical side of this bank branch rationalisation and then considers the impact found in these three inquiries. It then looks at the major alternative banking facilities available to rural communities. One of the alternatives is for the community to establish its own bank by buying a franchise to open a branch of Bendigo Bank. This paper examines this arrangement in some detail before drawing a conclusion from the options available to rural communities.

Structure of banking in Australia

Technically Australia has a dual banking system like the US with both State and Federal banking licences. However because of the Australian Constitution, State banks are limited to banks actually owned by State Governments. All privately owned banks having to be public companies and licensed nationally (Weerasooria 1996). The supervision of these State banks, again for Constitutional reasons, lay with the respective State Governments and this ultimately proved inadequate. Two State banks were sold as a direct result of losses incurred following the deregulation of the Australian financial system in the 1980s. All other State banks have since been privatised or merged with nationally licensed banks so that Australia now effectively has a national banking system.

Australia never had a unit banking system like the US, rather existing banks set up branches in new mining or rural communities as the population expanded during the 1800's. Consequently Australia has a small number of banks each with a large branch network. Even regional banks that had previously concentrated in one state have broadened their base into other states or taken over regional banks in another state. Consequently Australia's retail banking sector comprises four large banks (referred to as the Major Banks) and 10 regional or second tier banks, two of which are foreign owned. Additionally there are foreign owned banks and representative offices of foreign banks that largely service the corporate banking sector.

Being a highly urbanised country with 86% of its population living in clusters of 1,000 or more, most within 50 kilometres of the coast, rural Australia is sparsely populated (ABS 1996a). Nevertheless because the proximity of banking facilities was seen as a marketing ploy in attracting market share until the 1980s, even rural towns attracted bank branches. With the advent of technology that enabled ATM and EFTPOS facilities to proliferate and more recently, Internet banking, the 1990s saw Australian banks reversed this expansionary trend. In a drive to reduce costs, bank branches and bank staff were shed.

This research concentrates on Western Australia where a Taskforce reporting to the State Parliament investigated the impact of the withdrawal of banking facilities from country towns. It is also the State with the second highest incidence of newly established Community Banks.

Western Australia

Western Australia has a population of 1.7m which is even more urbanised than the Australian average and an even higher percentage (90%) living within 50 kilometres of the coast line (ABS 1996a). As Figure 1 below shows, there are only 9 centres outside the metropolitan area with more than 10,000 inhabitants and only 1 of these, the goldfields town of Kalgoorlie, is located away from the coast. Each of these large centres has a branch of each or most of the major banks and one regional bank. Consequently they are well services and the occasional branch closure is not as traumatic as in the rest of Western Australia.

This paper concentrates on the impact of branch closure on the smaller towns in Western Australia for which the term rural will be used. The population in these rural areas of Western Australia is aging, with those aged 65 and over increasing from 7.8% of the rural population to 8.9 % between to 1991 and 1996 (ABS 1991, 1996b).

Rural branch closures indicated that 12.1% of non-metropolitan branches Australia-wide were closed been 1996 and 1999. The branch closure rate in rural Western Australia as indicated in Table 3 was almost double this rate. Thus the published statistics mask the true spread of rural branch closures. Also, if the four new community bank branches of Bendigo bank are excluded, the existing banks closed virtually one quarter of all rural branches in Western Australia. If it's any consolation to those people living in a one bank town, they were no more harshly treated than rural town with more than one branch although the impact of the closure is greater as will be detailed below.

In the time period under study, only Goomalling lost more than one bank branch and these have subsequently been replace by a community bank branch of Bendigo Bank.

ws the location of all bank branches across Western Australia as at 31st December 1999. The "c" represents the community bank branches of Bendigo Bank and the "?" possible future community bank branches. The numerals represent the number of bank branches remaining in each town. Figure 2 shows the location and number of bank branches closed since 1996.

Australia has no equivalent of the US's Community Reinvestment Act and there are no regulatory restrictions on opening and closing branches. Thus there are no publicly available source for the information presented in Figures 1 and 2 and Table 3. These have had to be reconstructed from old telephone listing (DTMS 1996), annual reports of some banks and visits to each bank's web sites to search for each branch by name to establish its current status. The reconstruction was compounded by the increasing usage of a single phone number for state-wide (and Australia-wide) access to the bank, rather than a listing of an individual branch and its phone number.

Effects of sole branch closure

There have been at least 3 inquiries into the effects of bank branch closure on rural communities in recent years in Australia, most notably the closure of the last bank branch in a town. One was a study of Northern New South Wales/Southern Queensland communities (Beal & Ralston 1997). A parliamentary taskforce in Western Australia conducted extensive interviews in six communities in that state (Ministry of Fair Trading 1997) The most comprehensive inquiry was by a Federal Parliamentary Committee which received 157 submissions nation-wide, including from the banking industry and examined suggested solutions as well as the problems (Parliament of the Commonwealth of Australia 1999). The following findings are extracted from these reports.

Cash requirements

Without the convenience of a local branch, businesses in particular have to travel to another town for their cash requirements. In Western Australia this resulted in 43% of the respondents to the Taskforce's survey travelling more than 100km each way. Consequently they visit a bank less frequently and withdraw larger amounts of cash, creating a security problem within the community.

Individuals can obtain cash through EFTPOS facilities at businesses within the community but they cannot make deposits. This prevents recirculating cash and merely transfers the problem to the business community who must increase their cash holdings. EFTPOS is explained in the next section. Both the Queensland and Western Australian surveys found this resulted in the business community cashing more cheques and providing short term credit, with a subsequent increase in bad debts. Businesses that could not meet the cash needs of their customers reported losing sales, which the Queensland survey found to average $4,475 per month for these low cash businesses. Then there is the cost of travelling to nearby towns to do the banking. Not only fuel and wear and tear on vehicles but lost productive time. Also, the elderly, the disabled and those without transport are further inconvenienced in getting to a rear by town

Investment advice and income

Not only does the absence of a bank in a town means less frequent and larger cash withdrawals but reduced interest earned on savings as a result. Whilst typically these accounts only earn 0.10%p.a. on the first $2,000, surplus funds cannot be readily transferred to higher earning investments.

Investment advice appears to be one of those services that require face-to-face interaction and consequently lost time and travel expenses mentioned above, are an added disincentive to obtaining investment advice. This discourages investment activity and individual losses of between $100 and $2,000 p.a. in investment income were reported by the Queensland survey.

Availability of loans

Investments not only involve purchasing financial assets but also borrowing to finance the purchase. Reduced investment by both business and individuals were reported as a result of branch closures. The Queensland survey estimated between $0.2m and $0.6m in investments within each community were not proceeded with. However all forms of loans become harder to obtain and reflects in the increase in credit being sought from the local shop keepers mentioned above.

Impact on the community

Both the Queensland and West Australian studies found the closure of the last bank branch in a town led to a contraction in the local business community. Whilst locals were visiting their nearest town to conduct their banking, they now did their shopping there. The Queensland survey estimated a permanent reduction in spending within each local communities of between $0.3m and $0.8m p.a.

Thus the closure of a bank in a town and particularly the last bank in town, leads to a contraction in the community and a growing pessimism about its future. The loss of the actual bank jobs in the community also has a deleterious effect: their normal shopping requirements, their use of local facilities like schools and their participation in community groups are all missing. Also, there is a reduction in specialist knowledge of farming and finance matters within the community and the bank loses its familiarity with local conditions.

Banking alternatives

Agencies

As mentioned above, all banks in Australia have traditionally supplemented their branch networks with agencies conducted by small businesses in towns and suburbs. These agencies traditionally conducted what was referred to as saving bank business – deposits and withdrawals for personal customers. Businesses were excluded from using these agencies. Consequently when a bank branch closed in a town, if the bank had an agency in the town, this agency could not accept deposits, cash cheques or conduct any other business that was not for personal customers. Further, in most instances, these agencies used manual procedures and had no computer communication with the bank. Consequently they could not process large withdrawal, obtain account balances, issue bank statements or provide the services a personal customer would expect from a bank branch. Thus the traditional agency was a poor substitute for a closed branch.

Slowly this has changed. First Australia Post converted its larger post offices to giroPost Offices with the inclusion of EFTPOS facilities starting in 1995. This enables these Post Offices to provide some form of balance checking so that the withdrawal limit could be extended. In a further aggressive move into the bank agency business, Australia Post extended the number of banks they acted as agents for. Previously they, and all other agencies, acted exclusively for one bank. However giroPost remain agencies for personal customers only because of concerns about the cash clearance problems associated with business banking, the retraining this would require for their staff and the system changes required (Parliament of the Commonwealth Australia 1999).

Whilst Australia Post has nearly 4,500 outlets Australia-wide, only 2,724 have so far been converted to giroPost offices (RBA 2000). Of these, only between 25% and 38% are located in towns with a population of less than 2000 that do not have a bank branch (Parliament of Commonwealth of Australia 1999, Fig. 2.2 – 2.4). Thus giroPost Offices are one solution for personal banking in some but not all rural towns.

Another development in the banks' use of agencies has been the installation of computer terminals and ultimately, the acceptance of business deposits. Both BankWest and Westpac (operating as Challenge Bank in Western Australia) have changed the traditional business mix of their agencies. When Westpac closed its Toodyay branch towards the end of 1999, it replaced it with an agency in the Real Estate office across the road. This agency has a terminal linked into the Westpac network for recording deposits, checking balances etc. To open an account, the customer uses a telephone in the office exactly as you would from home using telephone banking. This agency can accept business deposits with cash being collected by security firms and cheques being couriered daily to the nearest branch. A loans officer from this same branch visits twice weekly.

This would seem an adequate work around for the community but does not allow the spontaneity of contact that the former branch provided. Anecdotal evidence suggests local residents were dissatisfied with this arrangement and have now put in place steps to open a community bank branch.

Another alternative being proposed is an aggregated service delivery model. Under this arrangement more than one bank would share the same premises and staff, with effectively the host bank acting as agent for other banks in accepting deposits, cashing cheques, making loans etc. This is the most favoured solution of the House of Representatives Standing Committee on Economics, Finance and Public Administration. Whilst the US has an extensive correspondent banking network, this is a new concept within Australia and to date it appears no banks have adopted this model.

Credit unions and building societies

These are cooperative bodies servicing their members and as a result, are less driven by profit. Traditionally they have been competitors for the non-business clients of the banks. Building societies originally targeted loans for housing through a branch network. Since deregulation of the Australian financial system in the mid1980s, the largest building societies converted to bank status in an effort to compete more effectively with the banks. Credit unions on the other hand are far more numerous but smaller than building societies, service groups with a common interest or trade. Consequently they often only have one branch and have tended to merge amongst themselves to improve their efficiency.

Formerly State-based legislation limited interstate branching by credit unions and building societies. A series of complementary laws passed in each State in the early 1990s created the Australian Financial Institution Commission which made interstate branching possible. Then from July 1999, responsibility for licensing and regulating these agencies transferred to the Australian Prudential Regulation Authority which also regulates banks. Consequently credit unions and building societies now have a growth path towards becoming a bank.

Because of their cooperative ownership and suitability to groups with a common interest, credit unions have been seen as a solution to the banking needs of rural communities. The Federal Government in conjunction with the government of one of the States (New South Wales) and the peak servicing body for the credit unions (CUSCAL), established a body to fund communities' research into banking alternatives. Since this body was established, new credit unions have been established in most Australian States. To make these credit unions viable, costs have been cut by sharing premises and staff with local councils and government instrumentalities (Commonwealth Parliament of Australia 1999).

Limitations of credit unions include that they provide only a limited range of banking services. Most offer savings and cheque issuing facilities for individuals but not business customers. Similarly, businesses are excluded from loans. Also, credit unions do not offer traditional banking services such as foreign exchange transaction, safe custody, international and interstate money transfers, and the issuing of notes and coin. These limitations of credit unions are accepted in the larger centres where there are banking alternatives. However it makes them less than satisfactory as the only banking alternative in rural areas.

ATM/EFTPOS

Australia has an extensive national ATM and EFTPOS network with all banks now providing mutual access to each other systems. Retailers with EFTPOS facilities who generate cash sales, encourage "cash out" when shoppers purchase goods to help them manage their cash float. The cards used for EFTPOS are the customers normal card used for ATM access. So long as a business has a telephone line, they can have EFTPOS facilities. Thus the banks have transferred some of their transactional activities on to retailers. However for retailers that do not generate cash, this can become an inconvenience. It is even more of an inconvenience in a rural community without a bank branch where the retailer has to supplement their cash with visits to another town, with all the costs that that entails.

An EFTPOS terminal does nothing more than verify the adequacy of funds to meet a withdrawal. It does not provide any account details or accept deposits.

For the first time EFTPOS transactions Australia-wide exceeded ATM transaction in 1997 as demonstrated in **Error! Reference source not found.**. Unfortunately the number of EFTPOS and ATM transactions have not been published since they were prepared as part of a submission to the Federal Governments Inquiry into banking in regional and remote Australia.

Source: Source: RBA 2000 Table C5 & Parliament of Commonwealth of Australia 1999

A television program in the early 1990s reported on the problems facing a rural community when the town had to rely on an EFTPOS machines for its cash issuing (ABC 1991). ATMs do not appear to be a viable option because of the absence of a local bank branch to service them. This was canvasses by the Taskforce in Western Australia (Ministry of Fair Trading 1997) but the costs to service the machines using cash escort companies was prohibitive and incurred considerable security risks. Thus EFTPOS is expected to be offered in rural communities but it is neither a solution for business banking nor for most personal banking requirements.

Telephone banking

Virtually every bank in Australia provides a telephone banking service, or at worst, a telephone help line. These are accessible to every business and household in Australia for the cost of an untimed local call from a standard phone which is currently about 30c. Where a full telephone banking services is provided, customers have access to at least the following services on their accounts previously linked to telephone banking:

- Account balances
- Cheque book and statement requests
- Transferring funds between the customers own account
- Payment of bills to any business that has adopted what is known as B-Pay.

Additionally, a bank's help line provides access to a human to perform many other service that are available by a pre-arranged password. Banks see telephone banking as the least high-tech, cheapest and most freely available technique to meet rural communities non-cash banking requirements. It is equally available to individuals and small business.

Internet

Every bank in Australia has a web site and all the major banks and most regional banks have a facility to do some banking through their site. All offer the same facilities as are available through their telephone banking service with the added advantage that the data can be visualised. Many banks also provide on-line loan applications and account establishment facilities. Unfortunately the Australian legal system is still largely based upon paper-based evidentiary procedures and consequently bank sites such as the Commonwealth Bank's limit loan applications to Australian residents who must identify themselves when submitting the proposal through a traditional branch (CBA 2000). This means people in rural communities can open accounts and apply for loans but must still incur travelling costs to visit the nearest town. For advice about loans or similar services experienced previously through a branch, prospective borrowers must ring the bank's help line or visit the nearest branch.

The National Australia Bank's does provide for business loans to be lodge from their web site. In reality though, most business loan applications would have to be lodged in person because of the more detailed supporting documentation and the more than likely need to clarify issues raised by the proposal. All these issues are more complicated when the bank requires security for the loan.

The Australian Bureau of Statistics (ABS) has been surveying access to the internet on an annual basis for the last few years. The latest survey (ABS 1999) found continued higher access to the internet in capital cities (26%) than in other areas (17%) and that those aged 55 and over, had an access rate of only 13%. Figures are not published for rural Australia, let alone rural Western Australia, but these figures would suggest with the aging rural population, internet access is not a wide spread option in communities without a bank branch.

These same ABS statistic report that most internet access is outside the home – 2.4m adults accessing the internet from home compared to 3.1m at work, libraries, a friends or colleges and schools. Many of these resources outside the home are not present small rural communities. Hence the Western Australian Government encouraged the establishment of Telecentres in country towns to provide a community facility that can not only provide internet access but also computing facilities for individuals and small business. In April 1999 there were 57 such Telecentres around the State, many in towns without banks (Government of Western Australia 1999). The Goomalling centre for example, pre-dates the closure of the original two banks in town. The premises are shared with the library and the coordinator acts as facilitator for Government grant applications, job search, resume writing and child care during school holidays. Thus these centres are a vital community resource and internet services are a small part of their operations.

Australia is in the process of extending its fibre optic network with metropolitan areas and coastal communities receiving priority. Even then, it is only planned to connect large regional centre. Consequently much of rural Australia, including Western Australia, is still using twisted copper wires. This makes for poor communication standards when phones are connected to hundreds of kilometres of this wiring which is barely adequate for fax and limits the adoption of technology by rural businesses (The Boshe Group 1997).

Thus access to the internet as a substitute for branch access is not as readily suited to rural communities as it is to their city counterparts whether they be individual or businesses. And of course, internet banking does not address the cash flow problems of a community.

Community banking

This concept did not exist until 1998 in Australia but there are now 16 community bank branches licensed by Bendigo Bank (Toodyay and Districts Community Financial Services Ltd 1999). Thus, community banking, or more accurately, community branch banking is a significant development in Australian, reversing the previous contraction of branches and warrants more detailed examination.

Community Branch Banking

The concept behind community branch banking in Australia is that of franchising. A public company is floated which purchases the franchise for a branch of Bendigo Bank. Technically the branch does not have to be located in a rural community but Bendigo Bank distinguishes itself from all other banks in Australia as being the only bank with its head office outside a capital city.

Before a community can purchase a franchise for a branch from Bendigo Bank there are a few formalities to follow. First, any public company requires a sponsor to take it through the set up and floating phases as it is not a separate legal entity until it is floated. Thus a community requires a sponsor to float the idea of a community bank branch. Initially in Western Australia this sponsor seems to emanate from the local government authority. The chairmen of the community bank branches in both Goomalling and Toodyay are senior councillors in the local shires. Anecdotal evidence suggests the Shires are usually the largest business in these communities and the most affected by bank closures. Also the Shires tend to hold significant funds which makes them an attractive target for a new bank.

The next step is to establish the viability of a bank branch. This involves a process of public meetings and consultations with Bendigo Bank. A local committee is formed to drive the project and to arrange a feasibility study by an independent consultant. Both Bendigo Bank and the local community must be convinced of the viability of a community bank before a franchise is sold. In the case of Goomalling, 502 survey forms were distributed to all households and businesses located in the town and surrounding districts. A 46.02% response rate was achieved. This survey is used to establish the likely business to be gained as the result of opening a community bank branch, and projects its profitability. For Goomalling, the survey indicated the respondents banking business totalled $26.8m with $17.8m available in the first year. Profitability of the branch is then projected for three years based on each of three scenarios – if the branch performs as well as other Bendigo Bank franchisees, only 80% as well, or only acquires the business identified in the survey. In each scenarios, the bank is expected to make a loss in its first year. However even in the worst scenario, the Goomalling branch was expected to generate its first annual profit by its third year of operation (Goomalling & Districts Community Financial Services Ltd 1999).

The minimum capital therefore for the new company must be sufficient to pay the franchise agreement and all other operating costs until the branch turns a profit. For the four branches in Western Australia this figure ranged from $250,000 - $300,000 with the right to accept over subscriptions of a further $100,000 in each case. A prospectus is therefore issued in the community to raise the necessary capital. However, the Australia Prudential Regulation Authority (APRA) limits individual share ownership in any bank to 15% of the bank's capital (APRA 1999). Therefore share ownership is also restricted in the company purchasing a bank franchise, but to10% of its issued capital (Goomalling & Districts Community Financial Services Ltd 1999). Thus to successfully float a public company in a community a high level of support is required. Reflecting its community base, shareholders have one vote regardless of the size of their share holding.

The profit projections for recently floated community branches included in their prospectuses are based upon a flat 25% growth per annum over the two years following the branch's initial year of trading. This is based upon Bendigo Bank's experience in their own branches and anecdotal evidence suggests the earliest established community banks in Victoria have achieved or exceeded this growth. However Western Australia has a different structure to its rural communities because of its shear size and a different agricultural mix to Victoria. As there has yet to be sufficient time to measure community branch banking performance in Western Australia, this 25% projected growth may yet cause some concerns.

The initial franchise is for 5 years with an agreement to extend it for a further two terms of 5 years each. However the franchise can be terminated by Bendigo Bank under certain circumstances, one of which is the lack of profitability of the branch. This is exactly the same as a traditional branch of any other bank and puts pressure on the community to support the branch. Whilst the support of existing Bendigo Bank staff is undoubted, how many bank executives in 1990 would have foreseen the 22.6% reduction in bank branches by 1999 as reflected in.

Community bank branches offer the full range of banking services that any branches of Bendigo Bank offer to both individual and business customers. The income earned by the franchise reflects both a margin on transactions and a commission on the more profitable lines of fixed term deposits and loans. Thus the local staff are encouraged to pursue both new deposits and loans. However they have two conflicting responsibilities – one to the local community and the other to Bendigo Bank. The local branch has no lending authority, requiring every loan proposal to be forwarded to Bendigo Bank for approval. It is possible at a future time when the first flush of owning your own community bank has died down, that locals will expect their own bank to stand by them in times of crisis. Only time will tell if this eventuates but with a lack of local discretion, this may lead to friction in the community.

Perhaps the most significant aspect of owning the franchise to a community bank is the ability to return profits to the local community. When the community was surveyed prior to establishing a bank, their opinions were sought on the types of community projects that could be funded from profits from the bank.

Thus community bank branching addresses all the concerns of rural communities that can support such a concept. It provides the full range of banking services for both individuals and businesses and most importantly, provides the cash flow mechanism that keeps the community viable. It will even provide funds for community projects from its profits. However, like any other bank branch, its long term existence in a town is dependant upon the support of the local community and to technological developments that may supplant its necessity. Also, community branch banking may still not viable in all those 71 smaller rural communities mentioned above, most that never had attracted banks in the first place.

Conclusion

The public pressure reflected in two State and one Federal inquiry into bank closure in rural Australia have led to the re-thinking of existing facilities and innovative developments in the delivery of banking and financial services to these communities.

Whilst using bank agencies, telephone banking, EFTPOS and internet banking does not provide all the services expected of a bank branch, the personal banking requirements of most inhabitants of rural Australia can be satisfied. However the needs of small businesses in these communities is less easily addressed. This applies particularly to the cash needs within the communities.

The recent introduction of community bank branches has addressed all the banking needs in those communities with sufficient resources to profitably operate one of these franchises. However there are still many small communities that have never had bank branches and will never be able to support a community bank branch.

It would therefore seem that rural communities must come to grips with technological advances and not rely upon the continued presence of a bank branch in their communities despite its short term advantages.

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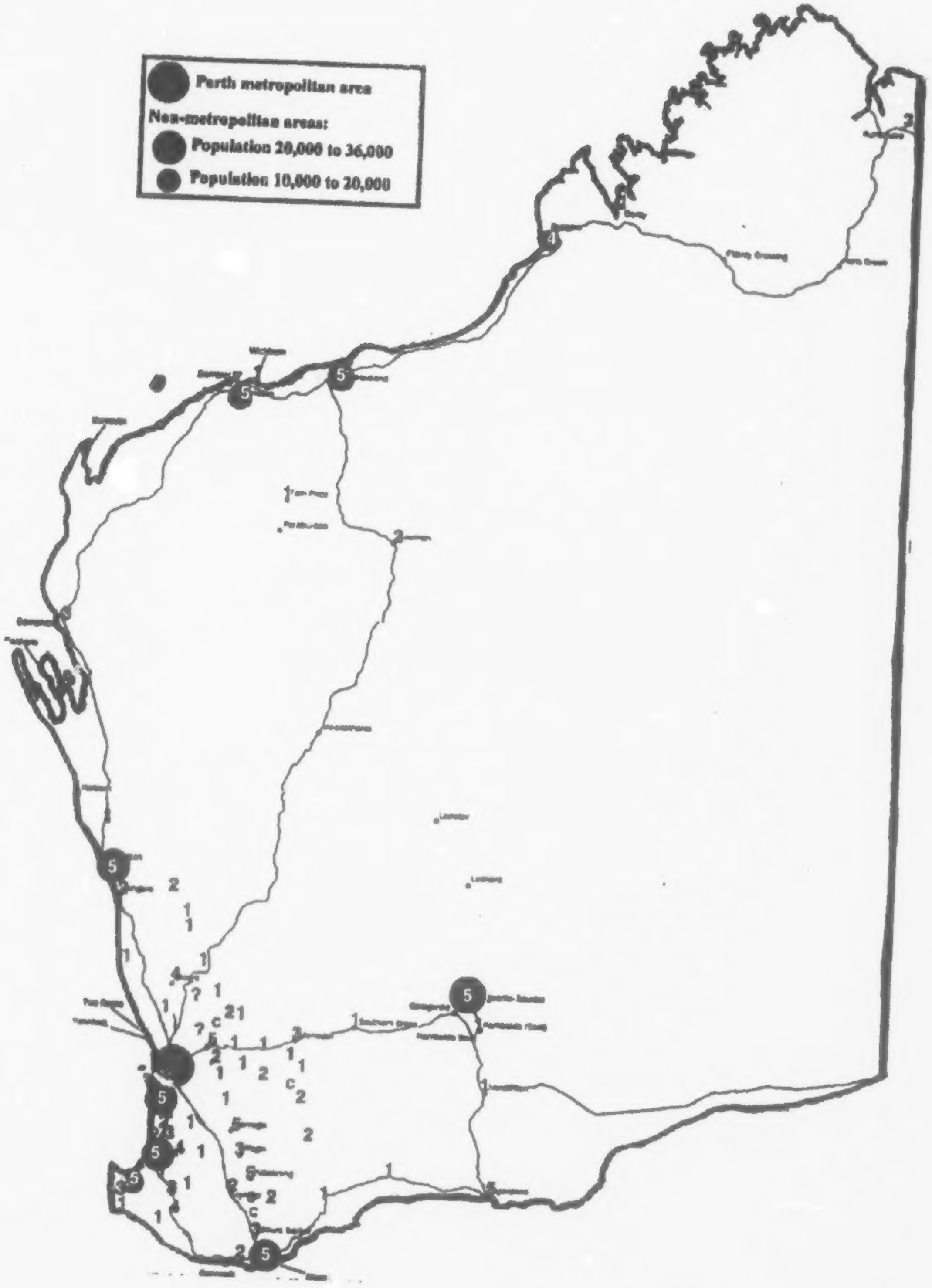
Figure 1: Bank Branch Distribution Across Western Australia, December 1999 (next page)

Figure 2: Bank Branch closures across Western Australia 1996 - 1999


Perth metropolitan area
Non-metropolitan areas:
Population 20,000 to 36,000
Population 10,000 to 20,000

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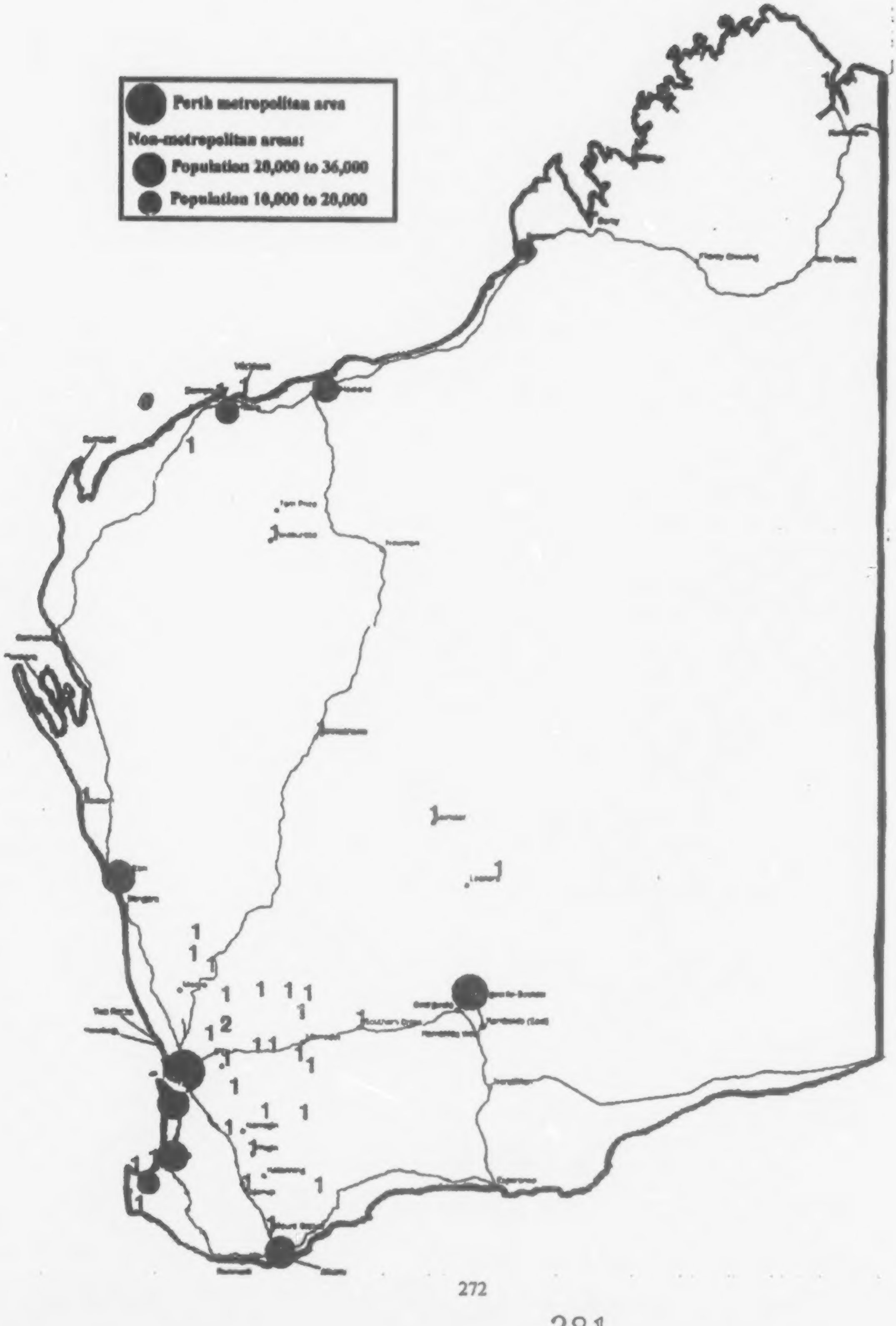
Perth metropolitan area
Non-metropolitan areas:
Population 20,000 to 36,000
Population 10,000 to 20,000
Southern Cross
Esperance
1
2

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Figure 1: Growth in ATM and EFTPOS access Australia-wide

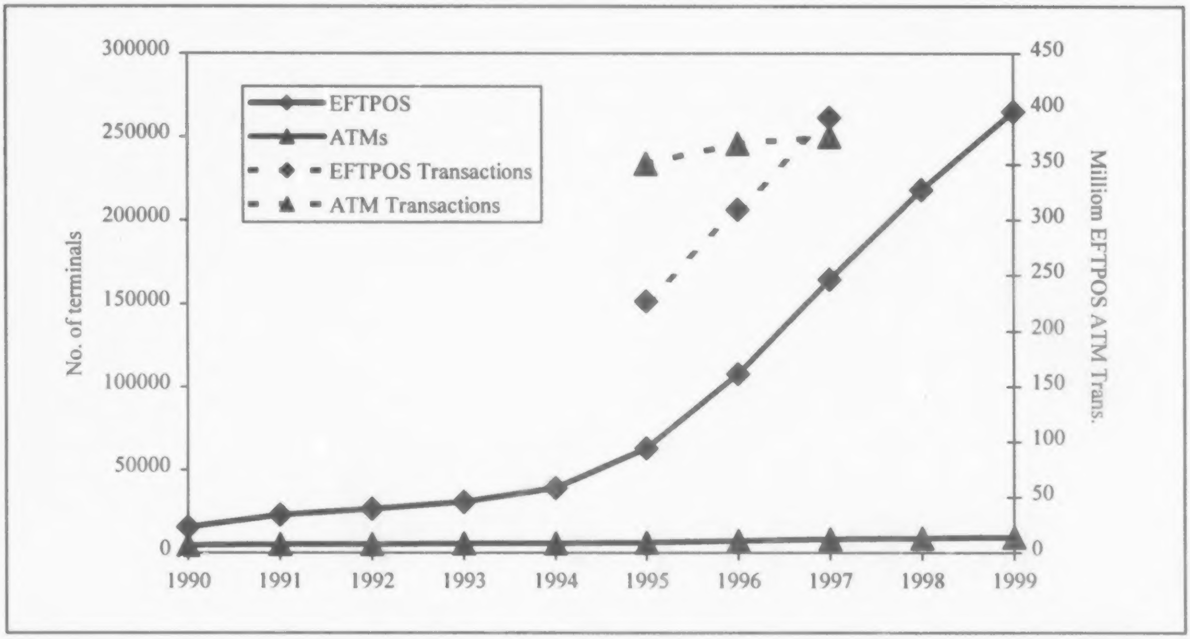

Table 1 depicts the national reduction in total bank branches whilst Table 2 shows how just one of the largest banks in Australia has shed more than 14,000 full-time equivalent employees (FTEE) since 1993, nearly a third of their staff. Non-metropolitan branches included in are not the same as rural branches as there are large urban centres outside the metropolitan areas of the capital cities that are well services by bank branches. Thus these statistics mask the real reduction in banking facilities in small rural towns. Table 3 attempts to address this by isolating data on branch closures in the rural area of just one Australian state, Western Australia. At the end of 1999, there were 71 rural communities with an average population of less than 700 without a branch of any bank in the State (ABS 1996b).

Table 1 : Australian bank branches

State	1999	1998	1997	1996	1995	1994	1993	1992
NSW	1850	1899	2089	2245	2344	2326	2439	2264
Vic	1274	1388	1546	1680	1679	1822	1983	2018
Qld	1061	1127	1213	1137	1129	1112	1118	1089
SA	447	447	484	539	561	564	577	588
WA	486	520	531	606	632	629	644	649
Tas	118	119	132	150	152	156	162	174
Total	5358	5615	6121	6508	6655	6747	7064	6920
Non-metropolitan	2311 43.1%	2425 43.2%	2622 42.8%	2629 40.4%	2665 40.0%	2685 39.8%	2906 42.0%	2888 41.7%

Source: RBA various, Tables B21/B23

Table 2 : Selected performance measures of the Commonwealth Bank of Australia

	1999	1998	1997	1996	1995	1994	1993
Full time staff	26,394	28,034	30,566	31,455	31,333	32,983	38,416
Part time staff	6,655	6,968	7,364	7,964	7,602	6,962	6,522
Full time equivalent Employees (FTEE)	28,964	30,743	34,874	36,084	35,822	37,269	42,329
Branches/service centres (Australia)	1,162	1,218	1,334	1,390	1,474	1,612	1,740
Agencies (Australia)	3,934	4,015	4,205	4,214	4,282	4,305	4,409
ATMs	2,602	2,501	2,301	2,113	1,643	1,486	n.a.
EFTPOS terminals	90,152	83,038	63,370	43,703	20,250	6,600	n.a.
Productivity							
Total Operating Income per FTEE ($)	190,720	171,811	147,558	138,450	131,693	114,277	103,168
Staff Expense/Total Operating Income (%)	29.0%	30.7%	33.8%	33.1%	33.6%	38.1%	38.4%
Total Operating Expenses / Total Operating Income	55.6%	58.5%	60.2%	59.6%	61.5%	66.0%	66.7%

Source: CBA various Annual Reports

Table 3 : Branch numbers in Rural Western Australia

	1996		1999			
	Rural branches	Sole bank in town	Rural branches	Sole bank in town	Rural branch closure	Sole bank closure
ANZ	23	8	14	4	39.1%	50.0%
Challenge/Westpac	47	17	32	13	31.9%	23.5%
Commonwealth	17	1	16	1	5.9%	0.0%
National	28	9	23	5	17.9%	44.4%
BankWest	34	7	27	6	20.6%	14.3%
Bendigo Bank			4	4	n.a.	n.a.
Total	149	42	116	33	22.1%	21.4%

Wool Co-operatives in Australia A Bridge Too Far?

Craig Symes, Australia

Abstract

Cooperative institutional arrangements are one viable vehicle for the advancement of positive economic outcomes in rural Australia, despite or because of the dominant deregulation agenda. This is not because co-operative-based organisations are inherently better or more flexible than present arrangements, but because the depressed global market for wool, agricultural industrialisation, and deregulation means that woolgrowers are being forced to reinvent the way they operate in the market.

Studies have indicated that co-operatives can be categorised in certain ways. The most applicable category is Melnyk's liberal democratic category. Within this category it is argued that the economic imperative is critical to the development of co-operatives. Further co-operative development tends to focus on single issues such as marketing.

In the case of Australia, cooperative enterprises have been dominant players in the dairy industry but such institutional arrangements have not been replicated in the Australian wool industry. In the context of previous research, this paper will examine: why economic factors have meant that co-operatives have not been popular in the wool industry in Australia; why wool co-operatives might be useful to the wool industry; and, the extent to which political as well as economic factors matter in the choice of co-operatives as an organisational alternative.

Introduction

In September 1999, the International Wool Section, of the Department of Agriculture, Fisheries and Forestry, Australia released a discussion paper on the advantages of co-operative organisation. The paper was developed in anticipation of an expected re-organisation of the wool industry: a re-organisation driven by the Federal Government's economic rationalist agenda, which has encouraged deregulation of Australian agriculture generally and the wool industry specifically. Further, the continuing over-supply of wool is exacerbating the depressed global demand for wool.

The combination of these factors has created an atmosphere where alternatives to a statutory marketing authority could be considered. Consequently a discussion paper was developed that set out in a reasonably detailed manner the advantages to wool producers of establishing co-operative marketing organisations[32]. The eschewing of the co-operative option by leaders of the wool industry was unexpected given that these representatives of the wool industry were involved in an examination of the industry's marketing arrangements.

This paper seeks to explain why the discussion paper on co-operatives failed to elicit a response from the wool industry. An evaluation of this lack of response will be undertaken drawing from literature that seeks to explain co-operative developments within liberal democratic society. Despite the wool industry having received minimal coverage in this literature, the more general discussion on agricultural co-operatives provides a useful model for comparative purposes. Whilst the relative importance of an economic driver to the long-term survival of a co-operative has been debated for many years (Cobia, 1989; Melnyk, 1985), a positive financial return is nevertheless, always a consideration for any fledgling agricultural co-operative. This paper accepts the importance that co-operative literature places on the fulfillment of an economic need if the co-operative is to survive long-term, but it will argue that political factors can also have an impact on co-operative development. It is worth noting that this paper is part of a broader research project that will examine the changing role of co-operatives in an agricultural sector that is rapidly being transformed.

Thinking about Co-operative Models

Consideration of co-operatives conjures up images of people undertaking some type of business or economic venture together, which they could not have achieved successfully on their own (Groves, 1985:1). It is accepted that organised cooperation brings with it recognised mutual benefits, including a sharing of resources and profits (Cobia, 1989: 106). Cooperatives achieve this through: combining an association of individuals and a common business; an identification of the members who are both shareholders and users; and, economic self-promotion of its members (Nicholas, 1994, 3). Further, while cooperation is sometimes put up as the opposite to competition, these two are not mutually exclusive modes of organisation. This is an important point given the desire to establish co-operatives within a predominantly market framework.

How best to conceptualise co-operative models of organisation has been addressed by a range of authors (Smith, 1961; Schaars, 1978; Melnyk, 1985; Cobia 1989), with varying emphases given to ideology, community, economic imperatives and the political/cultural environment. In this paper, I draw on the work of Melnyk (1985), who employs four political categories (liberal democratic, marxist, socialist and communalist) in an effort to distinguish between the diversity of characteristics displayed by co-operatives. Here I focus on his liberal democratic co-operative classification, which encompasses those co-operatives that operate in societies where capitalism and the market dominate. Co-operatives in liberal-democratic societies are dominated by those co-operatives that focus on a single issue (such as marketing or processing of a raw agricultural product).

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[32] The involvement of woolgrowers in the supply chain can take many different forms (companies, syndicates, partnerships etc) and need not be limited to co-operatives.

Co-operatives need to compete with private companies who are focused on profits and individual wealth maximisation, they are therefore required to take on some of their competitors characteristics (Cobia, 1989,10-19). Thus the market is still provided with a dominant role, there is a minimal commitment to co-operative goals of community development and egalitarianism, and the primacy of private property is not challenged. Co-operatives are not that different from companies in that ownership of co-operative assets can be traced to private individuals – a characteristic of a capitalistic private enterprise system (Cobia, 1989,16).

Co-operatives were created, "like many other institutions because of strongly perceived economic needs" (Cobia, 1989,22), but their growth and development is due to their ability to meet the changing needs of their members. They differ, however, from private companies in that they were formed for the purpose of mutual self-help, not individual profits. Additionally, if they are to legitimately be called co-operatives they will need to display some of the following principles; democratic control, mutual self-help, capital provision by members, and net income is distributed amongst members. In this sense whilst co-operatives have characteristics of capitalist organisations they can nonetheless be viewed as non-capitalist and populist because of the basic co-operative characteristics of democratic control and mutual self help (Melnyk, 1985,10).

A recent variation of the traditional liberal democratic style co-operative as described by Melnyk is the emergence of what have been labeled New Generation Co-operatives[33](NGCs). The term NGC has been applied to agricultural co-operatives that have emerged in North Dakota and Minnesota in the last 10-15 years (Stefanson, 1995,1). The NGCs differ from their predecessors in that their basic objective is not simply to sell a raw commodity but to value add to that commodity in some way. In the case of wool, a NGC would go further than selling greasy wool[34] and would instead aim to package and produce wool that had specific properties that were valuable to garment manufacturers, thereby adding value to the product and potentially attracting a better price.

The development of NGCs has been seen as a response to the industrialisation of agriculture production. Industrialisation, as described by Stefanson, refers to a more capital-intensive production, such as the adding of value to a raw commodity. It also relates to an increased interdependence between firms along the supply chain to provide a product that meets agreed quality and quantity criteria. This interdependence has also moved the element of risk away from price and production to relationships (1997, 3).

Both the traditional liberal democratic model of co-operatives and the more recent variation associated with NGCs, have placed a strong emphasis on the influence of economic factors in the establishment of cooperatives. This does not exclude the relevance of political and social factors (indeed these provide an important context), but given the interdependence of liberal and capitalist philosophies it is not surprising that economic factors dominate.

While Melnyk's work did not focus specifically on the categorisation of agricultural co-operatives, his framework can be applied to agricultural co-operatives generally, and within the wool industry more specifically because of its acknowledgement of the role of the market and the economic advantages of co-operatives for small producers.

Co-operatives are valuable to farmers (especially those with smallholdings) who have limited economic muscle as it provides a method for increasing their economic power. Co-operative activity can lead to advantages of economies of size in providing (packing, grading, processing, transporting) a particular product (AAC, 1988) as well as undertaking and commissioning research, developing and implementing quality assurance programs, developing linkages between market requirements and production decisions (Hassall, 1997).

In addition, co-operative enterprises provide farmers with a means of ensuring that services and goods are not priced excessively beyond the cost of that goods or services production (Smith, 1961,5). Finally, co-operative action, it is claimed, promotes self-reliance and development of a broad range of skills, without which an industry can become dependent on government or large private interests (Smith, 1961, 7). The self-reliance aspect of co-operatives has a strong resonance with the liberal philosophy of self-help and reflects the present Government's interpretation of mutual obligation.

Pursuing cooperative development in the wool industry

In this section of the paper I briefly summarise the arguments made in the discussion paper presented to woolgrowers and assess the reasons why the paper did not appear to receive the consideration we as policy analysts had anticipated.

The discussion paper entitled "Woolgrower Supply/Marketing Co-operatives: A Vehicle for Delivering Cultural Change", explored the establishment of supply/marketing co-operatives by Australian woolgrowers as a means of developing a more market-oriented approach to both wool production and marketing. The paper was aiming to tap into the mood for change which in turn had been motivated by a depressed global market, agricultural industrialisation, and the government's deregulation agenda.

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[33] These co-operatives are the latest generation of co-operatives and build on earlier generations of co-operatives that emerged in the 1920s and then 1940s.

[34] Greasy wool refers to wool that has not been scoured (cleaned) after it was shorn from the sheep.

The paper addressed a number of economic issues facing woolgrowers. Up until 1991, the Reserve Price Scheme protected woolgrowers from the vagaries of the market and thereby reduced the incentive to develop a collective marketing capacity (AFFA, 1999,1). As a consequence woolgrowers were dependent on large institutional players who were able to influence wool prices to their own advantage. With the end of the Reserve Price Scheme the interest in woolgrower collective marketing began. Alongside this, the role of government agencies has also changed, with the emphasis shifting from holistic support (eg. statutory marketing authorities) and individual support (eg. technical and professional advice) to that of supporting agencies for collaborative producer groups (Manwaring, 1992, 12).

Further, the Australian wool industry has not been exempt from the industrialisation of agriculture and woolgrowers are being encouraged to follow value adding and vertical integration strategies to help maintain economic viability. Woolgrowers, for example, are being encouraged to develop direct supply relationships with manufacturers (spinners, weavers, or knitters).

However, the selling, marketing, and distribution of wool is normally a bigger task than an individual woolgrower can achieve on their own, but it is within the reach of a large group of persons with a common purpose who pool their resources. Cooperation provides strength to small individual woolgrowers by bringing together people with mutual aims. Co-operatives in the wool context, we argued, have a dual role as a vehicle whereby the critical mass is achieved in order to be able to have an impact on markets and as a catalyst for reform at the producer level.

Given these conditions, the discussion paper argued that co-operative marketing groups had the potential to be an effective alternative to other marketing arrangements, because "The wool growing industry, like many other agricultural industries, involves a large number of relatively small enterprises with little or no marketing power" (AFFA, 1999, 1). Individual enterprises, with few notable exceptions have the quantity of product to develop supply relationships with downstream processors. "Co-operatives offer the opportunity for individuals to participate collectively in the global economy…co-operatives provide the mechanism for this approach" (AFFA, 1999,5). Individual woolgrowers selling separately into centralised purchasing and marketing channels have little chance of accessing downstream profits.

The wool industry does not have a significant history of cooperative development[35], despite the development in other industries such as dairy and sugar co-operatives in Australia. However, since the removal of the Reserve Price Scheme in 1991, over 20 woolgrower groups have been formed. These groups have been formed to secure premium prices for their product and have been organised around common bloodlines or geographic regions. An estimate, based on Hassall's study, is that less than 4 per cent of Australian wool production is sold by co-operatives.

The discussion paper acknowledged that new co-operative groups needed information and training in group processes, and leadership skills. These issues were also referred to by Murray-Prior who emphasised that such services needed to be readily available in rural communities (Murray-Prior, 1998, x). The difficulty of capital formation was also raised in the paper, but this issue was not deemed insurmountable. Indeed, the illustration of previous recent development of grower groups within the industry indicated that co-operatives were a realistic option for woolgrowers of any size.

Finally the paper argued that there was a significant community benefit from cooperative development. "Governments typically view co-operatives favourably as a means of promoting the well-being of the community, by assisting individuals, families and groups of persons to cope more effectively with the economic and social challenges confronting them" (AFFA, 1999,5). Co-operatives are specially suited for meeting the collective needs of their members, be they producers, consumers or workers, as the co-operative is obligated to act in its members' interests (AFFA, 1999,5). Co-operatives are about more than just profit maximisation. A pertinent point in the present Australian context, where there is considerable concern as to the wellbeing of regional communities, which has had both economic and political resonance. However, in the main, the discussion paper focused on the single-issue dimension identified by Melnyk in that wool marketing was the primary objective.

Prior to release, the paper was reviewed within the Department. The completion of the paper was planned to coincide with a meeting of a peak wool industry body and was to be considered at the meeting. However, the paper was not considered at the meeting, as it turned out that the co-operative option was not a priority issue. We then circulated the paper to a number of wool industry representatives informally, but as yet there has been no discernable response.

This lack of response could be explained by a number of factors. The wool industry in Australia, because of its early and enduring importance to the economy and to export markets, has been extremely successful in lobbying governments for support. This support has manifested itself through tariff protection, price-setting mechanisms, statutory marketing and research and development authorities. Because of the success of the lobbying strategy, and because the wool industry, despite its booms and busts, has generally been strategically placed, the economic imperative for the development of

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[35] Grazcos or Graziers Co-operative Shearing is an exception. Established in 1918-19 Grazcos became a large shearing, wool pooling and classing organisation. It was formed in response to industrial issues of the time – labour was scarce and contract prices high.

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co-operatives has been dampened. Consequently ongoing government support of the industry has in effect undermined one of the major drivers for the development of wool-based co-operatives.

Another reason why a co-operative initiative may have been ignored relates to the idea of cultural aversion. Murray-Prior (1998, ix) argues that "historically, Australian farmers have not competed in an environment that encouraged voluntary collaboration." His research indicates farmers will work together on a voluntary basis for a community cause, but with business related activities farmers are generally conservative and prefer to maintain their autonomy (1998, 3). As mentioned earlier there are few examples of co-operative development within the wool industry in Australia, and while more than 20 co-operative arrangements do actually exist, this existence seems to have done little as yet to undermine the cultural hesitancy of wool growers.[36]

This cultural hesitancy or inertia is exacerbated by the political/ideological paradox. Economic rationalism promotes the primacy of the individual, and the individual's relationship with the market, and this position undermines the development of co-operatives. However, the economic rationalist agenda of deregulation could encourage, indirectly, the development of co-operatives in that co-operatives require little regulation to succeed.

In Australia at present, the economic rationalist paradigm has resulted in The Future Directions Taskforce's recommendations aimed at reducing levy arrangements and reforming industry structures, in particular through the removal of statutory marketing authorities. However, while the government has a rhetorical commitment to deregulation, and in practice has supported deregulation of the wool industry it has not yet openly endorsed the privatisation of the statutory marketing authority.[37] Indeed, the continuing existence of the Statutory Marketing Authorities arguably undermines co-operative development precisely because these authorities are in themselves "compulsory co-operatives" (Febo 1987, 216).

Wool producers will have a say in this process of deregulation, so it is not a forgone conclusion that a totally deregulated market will eventuate[38]. Industry sources seem to suggest that the vote will result in the maintenance of some type of delivery structures to support marketing and research activities, but that these will continue at a reduced level and without government regulatory support. In this sense, woolgrowers appear to be hanging on to the more traditional type arrangements, rather than opening themselves up to more "innovative" alternatives.

Possibilities for future cooperative development in the wool industry

In 1988, an Australian Agricultural Council publication on co-operatives stated that "co-operatives and the concept of co-operation offer a realistic and valuable answer to many of Australia's agricultural problems" (Australian Agricultural Council, 1988,1). Now, over ten years later, despite the initiative being taken by a small number of woolgrowers, most have not embraced the co-operative option as realistic and valuable. Given this, what can be gleaned from the Melnyk framework for the future possibility of co-operative development in the Australian wool industry?

Melnyk argues for the importance of the economic imperative within his liberal-democratic political category and, as we have seen, while the statutory marketing authorities remain in place, there seems to be little economic imperative to stimulate the development of co-operatives in the Australian wool industry.

One of the difficulties with the Melnyk model is the lack of attention given to the distinctive cross-national variations within his liberal democratic category. For example, in Denmark the focus of co-operatives goes beyond the single-issue economic objective and includes social and civic dimensions as important factors. This stands in stark contrast to the case of Australia. Melnyk does not ignore the differences exhibited in social democratic countries but his broad-brush approach appears to underestimate the confluence of political as well as economic imperatives in explaining such a variation.

In the Scandinavian nations, parties of the right are fragmented and have seldom held power for long periods of time. Furthermore, there has been a history of what is known as the red-green alliance, whereby to gain parliamentary power, the left aligned itself with the farmers (Castles, 1978). In contrast, parties of the right have largely dominated government in Australia, particularly at the federal level, and farmers have in the main looked to the conservative side of politics to represent their interests at a parliamentary level.[39]

Understanding the problems and possibilities of future co-operative development through a lens that accentuates the importance of the political is important for the case of Australia. While wool production has declines over time, wool still represents Australia's third largest agricultural export and was worth $A2.44 billion in 1998-99[40]. There are 45,000 woolgrowers in Australia, with the vast majority of these being small producers who are complemented by a few large producers. In addition, Australia remains a large player on the world wool scene, with Australian production accounting for nearly a third of the world's wool clip.

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[36] In a 1997 study by Hassall and Associates 30 co-operative arrangements were identified as operating in the industry. Nineteen of these responded to the survey and combined they represented some 2000 woolgrowers and produced 90,000 bales.

[37] The wool stockpile was privatised in 1999

[38] WoolPoll 2000 will allow growers to vote on the nature and level of collective R&D and marketing services needed to support their on-farm activities. They have until 3 March 2000 to vote on the types of business services they require and the money they are prepared to invest in those services.

[39] Further research in this area could be well informed by the work of comparative public policy analysts.

[40] Total value of Australian agricultural exports for 1998/99 was $A22.5 billion

As a result, economic decline has not undermined the wool industry's power as a lobby group, and this power has been enhanced by the rural reaction to the effects of globalisation spilling over into the electoral realm. The rise of a minor party, the One Nation party, has drawn a significant number of farmers away from their traditional support of the Coalition conservative parties and in recent elections, some previously safe conservative seats are now marginal. Further, the leftist Labor Party in New South Wales has now established "Country Labor" in an effort to create the Australian version of a red-green alliance.

In conclusion then, it is evident that we as policy analysts were premature in thinking the time was ripe for consideration of cooperatives. It seems that not yet enough of an economic imperative exists.

However, the political orthodoxy has changed and governments are less inclined to impose regulatory solutions, even if such is requested by the wool industry. Wool politicians will also be hesitant to maintain the present level of wool tax because of the perceived failure, by their constituents, of the promotional strategy. Consequently the pressure on wool growers to develop their own solutions will increase as economic strictures and political ideology discourage the use of external government measures to ameliorate vagaries of the market.

It seems inevitable that wool producers in Australia will be left with two choices – modernise and survive, or stagnate and continue to recede. There is a significant historical importance tied to the survival of the wool industry – historically wool production has been the lifeblood of the Australian economy and Australian culture. Thus it is unlikely that it will be allowed to die off. It remains a possibility then that in order to modernise; the co-operative option may yet be a possibility, both economically and politically.

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PAPER PRESENTATIONS

Rural Social Welfare: Preparing Students To Work Effectively In Rural Communities: An Australian Experience

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Abstract:

The complexity of rural practice in rural and remote communities indicates that higher order skills are required by social workers. (Sturmey, 1992). The University of Ballarat is a regional university serving a large rural community in Western Victoria, Australia. In 1991 it began teaching a course in rural social welfare, to prepare students for work in social and community services in rural areas. Partly the course was developed to meet industry needs, as local agencies were unable to attract qualified staff, and young people moving to urban centres for training often did not return to work in their communities. While teaching generic skills, such as counselling, and group work, these are taught with emphasis on particular issues likely to occur in rural settings. The role of the practitioner as a professional, and also a community member, confidentiality and privacy, working within and between complex social networks are contextual issues that must be considered. As the course has a focus on preparing students to work effectively within rural communities, the course takes a strong philosophical approach using community development principles of engagement and empowerment within communities. This paper provides a brief framework of the course, the importance of working with rural communities, and evaluations completed by staff and students.

Rural welfare and community work in Australia is exciting, with many opportunities to develop a range of skills and expertise to an advanced level. Rural welfare practitioners must be able to negotiate the range of personal, professional and practice demands essential to effective and strong rural practice. The adaptability of the worker to new and alien contexts is a vital component of successful rural practice. (Sturmey, 1992). To adapt is more than simply understanding the socio-economic and cultural aspects of practice, as rural and remote workers live, raise families and become part of the community in which they work (Cheers & Lonne 1999). Relocating to rural practice may be initially disempowering, despite a high level of training or experience, as workers adapt to a new culture and establish their identity within a community. Some never adapt, and stay a year or so "in the bush," visiting larger urban centres most weekends and holidays, and bemoaning the lack of "culture and decent coffee."

In rural areas in Australia, there is an expectation of welfare or social workers to be able to work on many levels of practice. These expectations arise from the community, employing agencies, and workers themselves as they endeavour to address the varied needs of people in their local and regional communities. Welfare workers in rural areas are likely to be generalists rather than specialists, particularly in smaller rural areas. In larger regional centres, specialist services may be available eg. relationship counselling, or drug and alcohol specialist counsellors, but in less populous areas, the worker will be the main reference point for people experiencing personal and social problems.

Studies in a wide range of social, health, education and economic indicators have indicated that rural Australians face great disadvantages when compared to urban Australians (Cheers, 1992; Sjostedt, 1999;Tituaer, Trickett, & Bhatia, 1997). There is no doubt that rural Australians face many and complex social problems. (Alston, 1992, 1999). The high rate of suicide in rural areas, particularly among young people, is but one indicator of the difficulties being experienced in non urban areas of Australia (Commonwealth Department of Health and Family Services, 1997).

Rural social or welfare workers in Australia, are more likely to undertake community development, social planning, community consultation, management and research, and operate within the community using informal helping processes and networks than their urban counterparts (Pucket & Frederico, 1992; Cheers & Lonne, 1999).

The rural practitioner must understand and analyse the professional, political, economic and cultural aspects of the context, work within complex and often dense social networks, while being a member of the community. The fact that the worker lives within and is part of the community can create role problems. Ethical dilemmas and issues of personal privacy and security can arise, particularly if the worker is working in sensitive areas such as family violence or child protection. The setting of effective and maintainable professional and personal boundaries is often critical in successful rural welfare practice.

Frequently rural workers are employed in small agencies, or work alone. Supervision, support, and professional development needs of rural and remote practitioners are constant topics of discussion at conferences and in the literature.

From the employing agencies' experiences, attracting and retaining qualified personnel in rural and remote areas is difficult (Bradley, 1999). Several professional groups, and government bodies in Australia are working to address this problem with initiatives in training and recruitment.

To address the difficulties experienced by social and community industry in attracting effective qualified staff to rural areas of Victoria, the University of Ballarat, a small regional university, established a course to train welfare workers for professional practice in rural areas in 1991. A secondary goal was to provide training opportunities for people within the region, on the premise that once qualified, they would be likely to stay and work within rural communities.

Ballarat is a regional centre, with a population of about 100,000 and is about one and a half hours driving time from Melbourne, the State's capital. Ballarat is a major service centre, and provides specialist health and aged care services, education, and banking to the region. The University sees itself as both dependent on the region for its existence, and as a contributor to social, economic and community development.

Rural Practice in the Curriculum

The B.A.Rural Social Welfare was one of the first degree programs in welfare in Victoria, and its focus on rural practice is a distinguishing feature. Rural practice in the curriculum within existing courses of both social work and welfare is usually consigned to an elective, or included peripherally, (Sturmey, 1992), an approach often mirrored in other areas of professional education. Often it is considered to be merely a change in context, or as simply requiring knowledge of a specific culture. Geographical barriers, the conservatism of the country, and the impact of the context on the provision of services have been main themes (York, Denton, & Moran 1989).

This course developed rural practice as an integrated part of the welfare curriculum.. From course philosophy and recruitment and selection, through to curriculum design, teaching strategies, learning and assessment tasks, the emphasis is on how best to prepare students to work effectively in rural communities.

The B.A. Rural Social Welfare Course

a. Philosophy:

The course includes a strong philosophical approach. The foundation to the course is the importance for effective welfare practice of:

- a critical analysis of individual, social, cultural, environmental and structural factors relevant to welfare practice with particular reference to rural areas,
- relating personal difficulties to the social and political context,
- acknowledging and respect for differing ideologies, values and social functioning of individuals and communities, particularly rural communities
- rationale of current social policy initiatives and their impact on rural communities
- the need to understand and adapt practices to be effective in different communities or circumstances
- the importance of working with consumers, clients and others in a collaborative and empowering way, to enhance social functioning of individuals, families, groups and communities
- the importance of being a self reflective professional, and acting consistently with professional values
- the integration of theory, practice and research
- professional and personal integrity and adaptability
- that rural practice is different from urban practice,

The student must be able to:

- understand the interconnectedness of individual, family, collective and institutional levels of practice
- use multiple methods to understand multiple levels of analysis and practice
- understand the impact of being an 'actor' within the community
- focus on redressing disadvantage
- utilize collaborative approaches where possible
- endeavour to redress the negative effects of distance on service provision
- understand and work within dense social networks
- develop strategies to access scarce specialist resources
- manage the personal and professional issues when high visibility in a community can impact on personal privacy
- juggle multiple roles with integrity and awareness of potential role conflicts

b. Recruitment and Selection

Recruitment has emphasised the rural nature of the course. The word *rural* in the title, attracts students wishing to work in rural areas. Over the past five years the percentage of rural students entering the course has been very high, between 95 - 100 %. Students have applied not only from the usual region of the University, but from other regions across Victoria.

Selection is based on academic ability, an essay, an interview and referees reports. The interest or experience of the student in rural communities forms part of the final selection decision.

c. Course structure

The course structure includes compulsory units in social science and psychology taught within the Bachelor of Arts program. These units do not have specific reference to rural issues. The compulsory welfare units, which constitute almost 50 % of the course, are generic in nature, but focus on rural practice within their content. The welfare units are:

Orientation to Welfare

- Individual and Family Counselling,
- Social Policy and Social Change in Australia,
- Working with Groups and Communities,
- Rural Australia
- Advanced practice,
- Working in Human Service Organisations
- Preparation for Professional Practice: Fieldwork 1

- Preparation for Professional Practice: Fieldwork 2
- Professional Practice and Research

Students complete two fieldwork placements, (70 days) in agencies under professional supervision. Agencies are located in rural towns or regional centres. Liaison workers from the university are experienced rural practitioners, and placement helps identify strategies for students to use to address some of the personal and professional issues arising from rural practice, as well as developing integration of theory, practice, and research.

Benefits to participating agencies of taking students on placement include developing new programs, providing service, completing community development projects and undertaking evaluation or research in their communities.

Rather than consigning rural practice to "an elective" or one unit, the rural nature of practice is discussed in every welfare unit. Students are encouraged to learn the theories, knowledge and skills of generic welfare practice, and then explore how these might be affected by a rural context, and how strategies might need to be modified, to address particular concerns.

d. Examples of curriculum design

The *Rural Australia* unit comprises a social, political, structural and cultural analysis, combined with a focus on community development knowledge, skills and approaches. Students work in small groups, often with members of the public, or community groups, to investigate issues, and publish a report with recommendations, on problems experienced within local rural communities. Such reports have proved invaluable to local communities, who can take action to redress identified problems.

Examples of projects includes:

- Access issues for young people in Clunes: the need for improved public transport
- Child care needs of parents in Creswick and Daylesford,
- Drug and Alcohol Abuse in Rural Areas: Western region
- Effects of the Withdrawal of Banking, Education and Health Services on Rural Communities.

The *Working with Groups and Communities* unit uses case studies to demonstrate the need for sensitivity to the networks and other relationships that members of a group may have. Confidentiality and privacy, between group members and within their other relationships, can be more complex than first appears, due to the formal and informal social networks occurring in rural communities. While this may not be exclusive to rural practice, given the dense networks and the lower population, it is a problem that frequently occurs, and has very serious consequences for individuals, and for effectiveness of programs.

The impact of socialisation and culture must also be acknowledged. There are difficulties for recruiting group members to talk about personal problems in a social culture, which reinforces the notions of the "country Aussie battler" who gets through despite all odds and never grumbles.

The unit examines the difficulties in getting certain groups together because of the population base, or the dynamics of a particular community. Examples are parents of children with disabilities who may have no one within their community in a similar situation. Active discouragement by some members of a community regarding the establishment of particular groups: eg groups for lesbian or gay people may occur. Establishment of these groups must be planned sensitively and carefully to protect the privacy of individuals and to address group members concerns.

Students are encouraged to develop strategies to deal with the unexpected, to plan ahead, and to explore the potential of new technology such as teleconferencing which may be utilised to offer a "group" to people with specific needs. Students will prepare a plan to offer such a group, using current research and theory on group work, integrated with an analysis of the benefits and limitations of using such technology , and strategies to address any personal, professional or ethical issues that may arise.

Community based groups, and social action groups are a feature of this unit, and these theories and approaches are also reiterated within *Rural Australia*.. Developing and supporting community groups, leading from "behind", empowering people in communities are explored with a strong emphasis on sensitivity to individuals and their 'place' within their community, and the need to practice community development approaches within all aspects of welfare service delivery.

e. Learning and Assessment Tasks:

Learning and assessment tasks are developed within an educational approach emphasising deep learning and the integration of theory practice and research with an applied focus. Within this framework there is strong emphasis on professional values and expertise, and different learning styles are accommodated.

Assessment tasks frequently mirror tasks from the experience of workers in rural communities, and combine research, theoretical and philosophical questions, within a practical task. Groups of students work towards designing a practical approach to a particular set of circumstances. Within this task they must examine their personal and professional values and philosophies, link their approach with relevant theories, consider the style of practice, and the nature of the problems engaged, and identify and develop strategies to address the probable practice, ethical and professional dilemmas that may arise. In this way, students are encouraged to think creatively, within a professional framework, and develop teamwork and project management skills. Tasks are designed to encourage adaptable approaches, and to highlight the need for highly developed analytical and planning skills, while working in a participatory and empowering manner.

f. Student and Graduate Feedback

Students and graduates report a very high level of satisfaction with the course structure, the teaching methodologies and learning tasks. A recent survey of graduates indicated the course had developed characteristics such as:

- Adaptability
- Analytical skills
- Interpersonal communication skills
- Teamwork
- Ability to operate in the wider context
- Leadership
- Critical evaluation of information
- Interconnectedness of fields
- Understanding of professional and ethical issues
- Counselling skills
- Working with communities
- breadth of vision
- self reflection/self evaluation
- understanding theory and practice
- initiative
- flexibility
- negotiation skills
- design strategies to solve problems

Other indications in the review, of successful outcomes, were that the majority of students obtained work in a relevant field within six months of graduation, and most were working in rural areas or regional towns. Income levels were reasonably high for new graduates, and the information from the employers was very favourable, with comments made about enhanced conceptual ability, and practice skills. The fieldwork placements were seen as instrumental to achieving good outcomes for students, with many students being offered employment by their fieldwork agency on completion of the fieldwork placement.

Conclusion

The work of rural practitioners is challenging and rewarding. Graduates need to be adequately prepared to undertake the responsibility of rural practice, and develop personal and professional strategies to deal with the range of demands and the lack of personal privacy which can occur when working and living in rural communities. Courses in welfare and social work should be encouraged to integrate some rural examples of practice within the curriculum, rather than marginalising rural practice to an 'elective" within their course. Such integration, together with a thorough examination of personal, professional and ethical issues, can prepare graduates to not only survive rural practice, but to thrive in this environment to the benefit of their clients and their communities.

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Community-Based Model Of Service Deliver: Rural Communities Program

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Abstract

The paper will provide an overview of the Australian Government's Rural Communities Program and its successful community-based model of service delivery. It will also encompass a broad overview of the key social and economic features of contemporary rural Australia. This is the context within which the Rural Communities Program has developed; it is also the context for any future Commonwealth involvement in supporting rural industries and communities
The Rural Communities Program (RCP) has developed over the past 13 years. The original programs, with the majority commencing in 1986, were designed to address a significant "market failure" in the delivery of services to rural communities and farmers. These programs all operated on similar delivery models. The paper will explore these programs and discuss what lead to their merger on 1 July 1998 to become the RCP.

A community-based model of service delivery is a successful model for the delivery of projects that are generated, designed, organised, managed and evaluated by the community. Over the past 10 years I have worked in the management and administration of many projects both internationally and within Australia. I have found much delight in watching and working with rural communities to develop projects and it is with that preface, I write this paper.

The future of rural Australia?

Australia's future as a cohesive and prosperous nation is critically dependent on the economic, social and environmental well being of its regions. The new millennium will bring many new challenges such as rapid globalisation and changes in technology. The impacts of this pace of change are felt particularly in areas outside of Australia's capital cities. Some regional communities are struggling to adequately meet these challenges.

Access to services and service providers is increasing in the sense that there are more avenues now to access services via telecommunications, however, there are few local service providers in rural areas, and few farms with a computer have Internet access. The most pressing deficiencies in relation to alternative services appear to be lack of local alternative service provision and declining physical presence of government agencies.

In *Population Movements in Non-Metropolitan Australia,* Bernard Salt states "Many rural localities are experiencing net migration loss where broader agricultural and economic forces serve to erode the employment and population base. In some rural areas there is a long-term and consistent history of net migration loss. This population erosion is brought about by increasing economies of scale in local agriculture, a decline in the agricultural economy, improved transport systems making provision of local service redundant, and a paucity of locally based tertiary education or training facilities.

The Australian preference for living in coastal locations in warm climates is increasing. As a consequence an extensive part of the eastern coast is now populated. The emptying of marginal rural areas as selected provincial cities absorb the services and functions of smaller out-lying locations. Farm aggregation permitted by mechanisation, and the increasing demand for tertiary education, both serve to underpin steady flows of net migration loss from rural areas. Those moving out comprise all age groups, but especially young adults (school leavers) and a disproportionate number of young women.[41]

The Australian Government has recognised the urgent need to address a growing sense of alienation in many parts of regional Australia and to bridge the increasing gulf between metropolitan and rural areas. It is intent on working with communities to help them deal effectively with the pace of change and seek and exploit opportunities brought about by these changes.

In effect the Australian Government is taking practical steps to work with regional communities, business and other levels of government to ensure regional, rural and remote Australia has access to economic and social opportunities and services comparable to those available in metropolitan areas.

In the past three years, the Australian Government's primary focus in assisting Australia's regions to realise their enormous potential has been to deliver sound macro and micro-economic management of the Australian economy. There has been a renewed focus on service delivery providing communities in most need with greater access to a range of financial services, telecommunications, education and health services.

Through the Government's current ***Regional Australia Strategy***, it is intent on understanding and addressing the needs of regional Australia. Taking a comprehensive 'whole of government' approach, it is working together with communities to plan viable futures and deliver results. The Strategy is aimed at coordinating Federal Government activity in, and communication with, regional Australia. Ensuring coordination of the Government's efforts for regional Australia is a crucial first step in delivering what communities need.

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[41] Population movements in non-metropolitan Australia, AGPS, Canberra, 1992.

The ***Regional Australia Strategy*** draws together Government initiatives that impacted on regional Australia. Its foundation is a coordinated, 'whole of government' approach to achieving sustainable growth in regional Australia.

Within this strategy, the Government identified five key priorities including:

1. Improving regional services;
2. Fostering employment and business initiatives;
3. Enhancing regional infrastructure, particularly telecommunications infrastructure;
4. Improving family and community lifestyles; and
5. Achieving environmental sustainability.

The strategy's philosophy being to work together, strengthen links; bring services to the fore and to build on existing foundations.[42] New program funding was made available under this Strategy including funding for the Rural Communities Program.

In late October 1999, the Commonwealth Government held a Regional Australia Summit. In Hon John Anderson MP, Deputy Prime Minister's opening address he stated " He is genuinely worried that regional Australia is not sufficiently prepared, not just for a new century, but for the new age which is already upon us. He went on to say " We are moving – inexorably and unavoidably – from the industrial age to the information age. We cannot stop it. We cannot turn our backs on it. We cannot go back. Indeed, we cannot even stand still. What we have to do, as communities, governments, as a nation, is to honestly recognise the challenges this new age puts before us – but also make ourselves recognise the opportunities the information age presents, and get some ownership of those opportunities".

The outcomes and recommendations from the Summit are due for release in the first half of 2000. A new rural policy package to build on the successes and failures of the Agriculture – Advancing Australia rural policy package, and address new emerging issues, is expected to be presented to Government in March 2000 with an outcome expected in May 2000.

As stated previously, the Rural Communities Program (RCP) was funded in the Regional Australia Strategy context and commenced on 1 July 1998 with funding of $23m over a three-year period.

The RCP has developed over the past 14 years. Its predecessor, The Rural Communities Access Program (RCAP) commenced in 1995. The RCAP comprised of a suite of program components administered through the Department of Primary Industries and Energy. The RCAP aimed to assist people living in rural and remote Australia to access services and information.

The program components operated as separate programs, and were combined in order to effect efficiencies. These were to be captured through a reduction in permanent staff; savings in program administration; improved efficiencies in the delivery of the program and sharing of information and expertise across program components.

These smaller existing programs, the oldest commencing in 1986, were designed to address a significant "market failure" in the delivery of services to rural and remote communities. These smaller existing programs incorporated within RCAP were:

- **Rural Counselling Program** assisting farmers in financial difficulties to identify solutions to their problems (commenced in 1986)
- **Business Advice for Rural Areas** providing development support for new small businesses in rural areas (commenced 1992)
- **Rural Access Program** providing small grants for community-based educational, social and cultural projects (commenced in 1992)
- **Telecentres Program** assisting communities to establish community information technology facilities to foster enterprise, education and community development (commenced in 1995)
- **Australian Country Information Service** supporting community operated public information access points in communities without services (commenced in 1991)
- **Countrylink** providing easy and free access to information on government services and programs via a 1800 answer line, video lending library, the Rural Book, community notice boards and attendance at major rural shows and field days (commenced in 1988).

The RCAP was reviewed in 1997 to decide if there was a continuing need for the services supported by the program; and whether their current form, including the Government role in their delivery, was still appropriate. The evaluation found the RCAP to be an effective program, meeting a strongly felt need for assistance for rural Australians to access information and services. Another key finding of the evaluation was that the RCAP had empowered rural and remote communities to develop innovative solutions and overcome adjustment barriers.

The Evaluation report states "With the exception of the Countrylink program, all RCAP supported activities were based on a community management model whereby the responsibility for developing and managing the RCAP funded activities was held by a community-based management group, that may or may not include local government representation.

As pointed out by Cox & Veteri (1992: 55):

- community based service organisations are one important resource and knowledge base for rural

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[42] Regional Australia: Meeting the Challenges, CanPrint Communications Pty Ltd, 1999

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communities. They are important vehicles for community and social development because they can be responsive to changing needs, and through the provision of services, be aware of the impact of government policy on members of the community.

- Community managed services can also provide a vehicle for people to become involved in their communities and learn a range of personal and social skills, which in turn add to the human resources available in the community.
- Through the development and delivery of programs, community based service organisations are in touch with disadvantaged people in the community.
- They have access to a range of very useful skills such as: linking people and organisations, understanding systems and institutions, access to knowledge about resource availability, understanding the processes involved in getting resources to communities, conflict resolution and organisational development.

There are existing strong arguments for adopting community-based approaches to service delivery in rural and remote areas, including:

- community ownership of the program activities
- best knowledge about what services are required
- an increase in the trust in which the community held the program activities
- a decline in the perceived stigma of using programs of assistance
- an ability to bring in resources (labour, time, money and in-kind support) from the community
- a high degree of flexibility and responsiveness to community needs.

All of these factors contribute directly to the efficient and effective delivery of programs by community-based groups, under the RCAP. It was recognised that there were also a number of ways that the community-based structures that operate and manage RCAP funded activities could be better supported.

The RCAP already supported community-based management groups in a variety of ways, for example by providing support to management groups through conferences and information kits, assisting self-help organisations (eg supporting the Australian Rural Telecentres Association); and, when resources permitted, assisting applicant groups with designing and submitting quality applications.

In the landmark book on the role of government in service delivery, *Reinventing Government*[43], it is acknowledged that the three sectors, business, government and non-government organisations (NGO's) each have their own strengths. In particular, NGO's are declared to be better at activities that provide attention at the personal level giving commitment to individuals. All the RCAP components, with the exception of Countrylink, used NGO's for its service delivery to individuals. It is important to note that whilst the Government can distance itself from service delivery, it can not delegate accountability.

The evaluation recommended a revised program (to build on the successes of the RCAP) that fully integrated all the six program elements allowing small rural and remote communities to tailor the available services to best meet their needs. This recommendation amongst many others was implemented in the Rural Communities Program.

What is the Rural Communities Program?

The Rural Communities Program came into effect on 1 July 1998. The program aims to encourage community ownership and a high level of community involvement. Under this program not only do the communities have to match the Commonwealth Government funding, they also contribute considerable resources and time in the management of the services. Community ownership is the key point as it is seen to directly influence the focus of the service to ensure it continues to meet community needs.

The RCP is an initiative to strengthen and increase the capacity of regional and rural Australia by encouraging them to take leading roles in their own development. Regional and rural communities are encouraged to work together to identify, develop and implement strategic plans and projects to assist their development.

The program's goal is to encourage diverse, dynamic and self-reliant rural communities and profitable and sustainable rural industries. The RCP supports activities based on a community management model whereby the responsibility for developing and managing the RCP funded activities is held by a local community based management group, that may or may not include local government representation.

The Program provides a pool of funds from which applicants can apply for a grant to support any project that falls into one or more of the following categories:

- Community Planning
- Financial Counselling
- Information Provision
- Information Services Technology
- Community Development

Priority is given to projects that focus on small rural communities with populations of 10,000 or less. The applicant group desirably represent an appropriate cross-section of community interests. The group ideally have a reasonably balanced representation of gender, local organisation interests and age, including youth. Each application must be accompanied by evidence of cross community support.

Applications are assessed on their merits. While the following forms the basis for assessment, projects don't necessarily have to meet all criteria to be successful:

- Focus on a local, rural community;
- Generation of a community resource;

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[43] Reinventing Government, Osborne, D and Gaebler, T, Plume, New York, 1992

- Linked to improved competitiveness of rural industries;
- Extent of benefit to the local rural community;
- Extent of community support and management;
- Extent of need;
- Availability of resources to address the need;
- Ability of applicant to conduct the project.

What Contributions are expected from the Community?

The Community Group are required to contribute towards the overall costs of the project. This contribution may be made in cash or "in-kind".

- The Commonwealth will meet any reasonable costs of Community Planning activities.
- The Commonwealth will meet **up to** 50% of the cost of any Financial Counselling project.
- The Commonwealth will meet **up to** 75% of the cost of any Information Provision,

Community Development and Information Services Technology Projects

Examples

Since April 1998, 536 applications have been received with $22.763m awarded in funding to some 241 groups. Applications have varied from $1000 for community planning to $250,000 for major works projects. Three particular projects that demonstrate some of the positive and negative outcomes of the program are:

Longreach (39) – Funding of $360,000 over 3 years This project covers a large area of some 500,000 square kilometres and 14 shires. Longreach is a very remote area with inadequate services. The Commonwealth government has been supporting a financial counselling service in this area for over 8 years with the client numbers remaining static. This support has been a catalyst for other government funding. It successfully demonstrates the whole of government funding and support approach with the Commonwealth, State and Local Governments all working with and providing financial support to the local community. This area does have problems finding staff and when they do find them, keeping them.

Kangaroo Island (49) – Funding of $272,900 over 3 years Kangaroo Island has a populationof some 4000 people and is isolated with limited services, an aging community and limited youth. People, who can afford it, can travel to Adelaide easily, with morning and afternoon flights, and regular ferry services to the mainland as well.

This group commenced originally as a financial counselling site. Over the past two years they have expanded to include financial counselling, information provision and small community development projects. They are also contracted by the other South Australian grantees to act as the information distribution centre. This proactive, cooperative community group has grown with the support of their community to provide increased services. As a result the committee members have become more competent in project management and confident in their own abilities.

Coonabarabran (50)– Funding of $137,000 over 3 years Coonabarabran shire has a population of 7326. It is relatively well serviced for tourists and the transport industry but has limited educational, health, internet and public transport facilities for the general community. Coonabarabran is on a major highway and is a regular overnight stopover for commuters. The Commonwealth and State governments have been funding a financial counsellor in the community for some 10 years and an information officer for some 5 years. The financial counselling project was administered by a local community group and the information service by the local council.

Since the commencement of the RCP the group have applied and been successful in receiving funding for not only financial counselling and an information officer but also a new Telecentre. The community also received funding to conduct the inaugural RCP Conference in October 1999 with over 200 people attending. The group successfully planned, organised and conducted the whole conference. Quite a feat for a small community such as Coonabarabran. This group has grown in strength and is now looking at merging with other community services. They are also planning for that next project, that may have looked impossible or like a dream some two or three years ago.

Pitfalls

Problems with this model do exist. There is evidence of community management burnout as the volunteer base of rural communities is depleted by the aging population, youth leaving the smaller towns to seek work and adventure and people becoming tired.

Communities also have trouble raising their required contributions and this can lead to communities loading the monetary value of their in-kind contributions, it may inhibit them from applying for further grants or expanding their services, and poses the question 'Does it really add to the success of the project?'.

Some project elements are seen to compete with private sector service providers. Others may argue the elements compliment these services and promote a whole of government approach, in colloboaration with the rural community, to service provision.

The introduction of the Goods and Services Tax on 1 July 2000 will bring about a new set of problems, processes and an increased client base for the applicant and program administrators.

Conclusion

In regards to community based model of service delivery, the importance of information and its optimum use is stressed: rural Australian industries are now to a large extent information based and this is likely to be more so in the future. Rural communities need access to high quality, appropriate and timely information, including information from government sources. The community-based model of service delivery adopted by RCP is one that has been identified as highly appropriate for rural and remote communities. The success of this approach has been reinforced through community consultation, though there is a need to maintain adequate resourcing and support of such groups, to help them operate in as efficient and effective way as possible.[44]

The RCP recognises that each community has its unique needs. The program provides opportunities for community groups to take advantage of a more flexible and responsive approach to service delivery. Through the RCP, communities are able to define the services that will best service their needs.

The program also encourages communities to look more holistically at the needs of their community and to prioritise and plan the development of services needed. This not only involves the community assuming ownership of the development but also significantly changes the focus from Government to the community in terms of their future, their responsibilities and accountability for their actions. Government assistance is most effective when communities have clearly identified problems and have "ownership" of them.

In short, it is best when we work together to deliver local solutions to local problems. Working together, sharing our problems, our knowledge and our solutions, we can and will all succeed.

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[44] Evaluation of the Rural Communities Access Program, DPIE, Canberra, 1997

The Intractable Division In Australian Rural Communities: Agrarianism Or Racism

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Abstract

The paper looks at some of the difficulties encountered in rural areas marked by cultural and/or 'racial' difference. It is based on research over a long time period into cultural pluralism and multiculturalism in a sugar cane growing district in north Queensland. The discussion outlines the social processes developed to maintain both harmony and social distance where people were tied together economically but divided by competition for resources, by national and cultural loyalties and understandings of racial difference. It is argued that two issues were at stake; the prosperity of the sugar industry and a desire for a 'community' where face to face interaction was relaxed and comfortable. The concept of multiculturalism provided the ideological basis for unity in the 1980s. However, 'white' Australian residents who were proud of this achievement did not acknowledge that the multicultural community still excluded indigenous Australians. Further, in arguing that 'community' was achieved by 'putting past hostilities behind them', they attempted to silence the voice of Aborigines seeking to negotiate a place in contemporary society by rewriting history in their own way. The analysis focuses on the manipulation of symbols of belonging and exclusion, the changing and fluid nature of cultural boundaries and the cluster of shared values which relate more to an inward looking agrarianism, than to the inclusive tolerance of multiculturalism.

An anti-racist discourse centred on the position of Aborigines in Australian society gained rapid momentum from the early 1970s. It was paralleled by a separate, but related debate about multiculturalism and the rights of post-war immigrants. Progess toward a more inclusive and tolerant Australian society now appears to have stalled and public debate focuses on what is described as a "retreat from tolerance" (Adams, 1997) which is most apparent in rural and regional areas. This paper examines how these issues have been manifest in a small rural district in north Queensland that was the locale for a detailed study of social interaction between cultural groups (Elder, 1996). A high level of cultural diversity in this small rural population makes it quite unlike most Australian country districts.

Although not an examination of community per se, the discussion which follows is concerned with the link between racism and the symbolic and moral aspects of community (Husband, 1996). It refers to representations of collectivity including ideologies and myths that underpin understandings of local history and identity.

The boundaries of symbolic communities are marked by cultural symbols (Cohen, 1985) but their reproduction depends upon everyday social practices which incorporate racist, ethnocentric and gendered power relations (Anthias & Yuval-Davis, 1992; Pettman, 1992). These practices are embedded in day-to-day social relations and comprise various forms of social distancing which do not necessarily involve spatial separation; rather many involve techniques of labeling, shaming, denigration and exclusion from economic and political networks. Similar practices operate within communities divided by class, gender and so on but where inter community relations are concerned (racialized ones in particular), they function to create out-groups which, in this case were perceived largely in moral terms.

This discussion hinges on the idea of a symbolic or ideal moral community, which unites its members in the face of adversity and, on the negative side, distinguishes them from morally inferior 'others', promoting and reproducing racism and ethnocentrism. It is important to note that the boundaries of the symbolic communities are fluid and permeable (Barth, 1969) incorporating new members and excluding old ones at different times. At various times in the history of the area studied there was a multiplicity of such communities plus fragmented out-groups. The analysis (Elder, 1996) traced the pattern of changes over time, to reveal clear movement toward a single pluralist collectivity that incorporated most of the population. The question to be addressed is why has one group of long-term residents of the district, Aboriginal Australians, have never been included.

Immigrants and the sugar industry

This north Queensland sugar-farming district attracted immigrant workers from many countries over the period from the 1860s to the 1960s. Immigrants came primarily from Europe, but at various times in the late C19 and early C20 large numbers of Asians and Pacific Islanders worked on plantations in the district. Migrant workers were needed to harvest the cane crop until in the 1960s when the process was mechanized. A great many of the European immigrants who arrived as cane-cutters became land owning sugar farmers by means of hard work and thrift. The plantations on which the industry was based in the nineteenth century were broken up into farms at the turn of the century. Although most indentured 'coloured' workers were repatriated or left the district at that time, a small proportion stayed on.

The analysis of the changing definitions of community and targets of discrimination and exclusion was framed within an historical overview of the local economy. At different times, the dominant group or groups saw Aborigines, Chinese, Pacific Islanders, Italians and finally 'migrants' as undesirable 'others'. Aborigines have never been able to throw off this label and remain firmly outside community life despite all other groups eventually being incorporated to a greater or lesser degree.

This paper is too brief to examine the complex pattern of intersecting class, ethnic, gender and 'racial' factors that explain group relations over time, but two points need to be made. First, economic factors were primary in an obvious sense, but in no way could the community relations be 'read off' the economic analysis. Nevertheless, the fortunes of the sugar industry totally dominated the local economy. The Colonial Sugar Refinery owned the two sugar mills in the district and the management decisions of this powerful company played a large part in determining the direction and success of the local industry. Decisions about local investment and expansion of milling capacity and the way in which the Company's labour recruitment program shaped the population mix in the district were most significant. In addition, management relations with different groups were a factor in local group relations and management personnel were influential in local social life and politics.

The second point refers to interpreting the experience of interaction between members of different cultural groups. Several factors were at work here. Cultural boundaries determined patterns of day-to-day interaction and thus shaped experience at a personal level. Popular media discourse offered a repertoire of racist, national and cultural stereotypes which were selectively incorporated into local representations. State policies and regulations relating to such things as immigration, industrial relations, labour markets and 'Aboriginal protection' created a context within which certain forms of discriminatory behaviour were legitimized. Government responses to attempts by unions to restrict the importation of labour, industry demands for immigrant workers and government concerns to populate the remote tropical north for defence reasons were important issues that, at times, either sharpened or blunted local racist and cultural distinctions.

Both economic structures and national discourse in the form of popular media representations and political debate have always been important in local understandings of cultural difference. However strategies of community closure are also linked to experience of personal interaction between members of different cultures, the amount of interaction and the situational context of interaction.

The multicultural community

The emergence of a self-consciously proud 'multicultural community' in the district in the late 1970s can be seen as a very significant local achievement. The 1930 were noted for a proliferation of groups defined in terms of their country or region of origin. Finns, Basques, Spaniards, Chinese, Pacific Islanders, northern and southern Italians formed groups with their own networks, organizations and language and purposely maintained a separate social life and identity from the dominant community of 'Britishers'. This consciousness of cultural difference was characterized by harmonious, formal relations between groups. However, the very large numbers of Italians posed both an economic and cultural challenge to the 'Britishers' with relations between them being strained beneath the surface politeness. Many of the Italians were prosperous landowners with refined tastes by local standards and the fascist government in Italy actively encouraged chauvinism amongst them (Cresciani, 1980). The rivalry between 'Italians' and 'Britishers' was well managed until WWII when many Italians were interned as 'enemy aliens'. Wartime nationalism combined with economic jealously and personal feuding loosening public restraint and open conflict erupted. Verbal abuse, street fights and overt discrimination became the norm between these groups during and immediately after the war.

The transformation of hostile relations into a tolerant multiculturalism was facilitated by the post war boom in the sugar industry. The expansion of the industry to supply new export markets was organized according to impartial government regulation providing opportunities for all farmers to benefit regardless of cultural origin. The industry had been tightly regulated from the late 1920s and farmers were required to participate in local industry organizations. Working jointly on expanding and ensuring the prosperity of the industry and less distracted by competition, they came to see each other more as individuals distinguished by levels of agricultural skill and industriousness than as members of different cultural groups.

Increasing intermarriage between second and third generation immigrants was also a significant factor. Enforced interaction in the intimacy of the joint families created by cross-cultural marriages increased appreciation of common family values. Women who previously had been locked within tight cultural communities came to appreciate the domestic skills of their in-laws. As mutual respect increased within the new joint families, suspicion was reduced and criticism and gossip stilled.

Members of the multicultural community shared a sense of identity based on participation in the sugar industry. The community celebrated the struggle to develop the industry and the role of different cultural groups in that process. This was more important than cultural plurality itself. Emphasis was on the role of pioneering families, early farmers, cane-cutters and millworkers in a success story of joint effort. Issues of class and ethnic difference were submerged in a story highlighting individual achievement, endurance, farming skills and family solidarity. The new celebration of plurality and tolerance was founded on the agrarian values central to their foundational myth.

Limits to multiculturalism

Aboriginal people had no place in the sugar industry. Theirs was a history of social and economic marginalization. Rather than being actors in the development of the district, they were the objects of government policies of control and so-called protection (Kidd, 1997). Most of those who survived of the brutality of early settlers and introduced European diseases (Reynolds, 1982) were removed by 1919 to live on a closed settlement on a nearby island. They were prevented from developing a community life of their own around until the 1950s when policies were transformed by the idea of assimilation. Under 'protection' (introduced in 1898), Aborigines were non-citizens or wards of the state whose lives were largely determined by decisions of central bureaucrats and local officials. They had no control over their education or place of employment (Kidd, 1997). Men tended to be placed in the cattle industry (May, 1983) and women into domestic service. Only when emergency cane-cutters were needed during WWII did they participate in the sugar industry. They began returning to the district at the time cane cutting was mechanized. In the following decades of increasing unemployment, with their low educational levels and limited work experience, they were the last to obtain jobs. Some of those who found permanent work were respected as hardworking but most remained on welfare and were seen as lazy and dependent.

While racist attitudes and policies explain exclusion and denigration this easily enough, the point is that 'race' was not entirely the issue. Pacific Islanders and other 'coloured' groups worked as agricultural labourers and Chinese business people were important in retail and finance. These groups had been racially vilified in the past but were eventually acknowledged if not always honoured, along with the European immigrants in the multicultural community. People of Pacific Islander descent in many ways epitomized the agrarian ideal as being hard working and reliable, dedicated horticulturists with large stable families who had demonstrated their self-sufficiency in times of need. Their strong attachment to Christianity further demonstrated their moral worthiness.

Rural economic crisis

When low export prices and high interest rates created an sugar industry crisis in the early 1980s, government policies aimed at restructuring the industry to make it more internationally competitive were accepted as necessary. Since then, continued rationalization of the industry and the removal of protection have led to a fuller realization of the breadth and impact of the current changes (Passmore et al., 1996). As national debate on these issues gains momentum it appears that farming itself is under attack.

The small producers who previously were acclaimed as the backbone of rural Australia now fight for their survival in a sugar industry stripped of protection in globalized commodity markets. Media coverage of the population and economic changes that threaten to destroy the social fabric of small towns and farming districts has increased consciousness of community in a moral and social sense. The multicultural community is a strong unifying force in the face of these challenges.

There is a strong sense of betrayal by government. Government agricultural policy is seen as an attack on rural families and communities who are exhorted to 'get big or get out' or to be innovative, efficient and to depend less on government assistance whilst coping with dramatically fluctuating income returns. Anger and resentment about these things are linked to the increasing recognition of the rights of Aboriginal Australians in public discourse; a process began in the 1960s. Despite considerable reluctance on the part of the current conservative federal government, pressure to improve the social and economic conditions of Aborigines is irresistible. At local level, funding for special Aboriginal educational programs, housing and small business development are greeted with cynicism and jealousy by non-Aborigines. It appears to many that the economic fate of hardworking families whose efforts built the sugar industry now count for little whilst special consideration is paid to a group who contributed nothing and whose dependence on the taxpayer continues to escalate.

Before the economic changes in the 1970s when tolerance was much vaunted, it was apparent that experience of interaction was opening the way for a reassessment of derogative stereotypes of Aborigines. Individual Aboriginal work colleagues, neighbours and members of parents groups were perceived as exceptions, or 'good' Aborigines who shared concerns about children's education, working to obtain a regular income and domestic order. These small steps in the direction of moral inclusion have been halted as the old imagery of denigration associated with hard-line racism re-emerges. Until the 1990s, relations between Aborigines and others had resembled those between cultural groups in the 1930s, with harmony achieved by polite public interaction and social distance. More recently this has been replaced by open criticism, conflict between young people and greater expression of sensitivity to insult by Aboriginal residents, who being more politicized, claim rights far more assertively.

Conclusion

The roots of the 'retreat from tolerance' and the continued exclusion of Aborigines from the community can be traced to a complex interaction between national and local issues.

The rural district examined in this paper was unusual in its cultural diversity but it is an interesting example of the capacity of rural populations to create collective solidarity. The sense of community achieved by immigrant groups is still highly valued. Many are proud to recount how they "put the past [group conflict] behind them" in the 1970s.

Like many others in rural Australia, they remain uncomfortable, but resentful about the position of Aborigines today. Political strategies to resist economic change strengthen the multicultural community while deepening the divisions between immigrant and indigenous Australians. Contributions to national debate on rural restructuring, Aboriginal welfare, land rights and reconciliation are frequently emotive, rhetorical and racist, fuelled by economic vulnerability and uncertainty about the future. By representing the lives and values of contemporary Aborigines in very negative and racist ways as wasteful, lazy, dependant and so on, exclusive rural communities are implicitly calling attention to their economic contributions to the nation based on an idealized image of their own moral worthiness.

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Following The Canada Goose: Teacher Supply And Demand Issues For Rural School Districts

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Abstract

This paper will examine trends and issues for teacher supply and demand in rural school districts. Specifically, it will outline a research study that investigated the needs of British Columbia, Canada school districts and the supply of preservice teachers by universities and university-colleges. The salient finding is the "Canada Goose Syndrome" that entails rural teachers leaving the isolated and rural school districts to pursue teaching careers in the south of BC to meet the needs of school districts who have experienced rapid retirement and will continue to experience massive retirements. This syndrome will leave rural school districts, already devoid of qualified teachers, without many teachers. Some evidence will also be presented from other provinces and countries that are also feeling the draw of the Canada Goose flying south.

The problem of teacher supply and demand has slowly crept up on many countries around the world[45]. University student enrollments have markedly increased in the last decade as young men and women are attracted to high-paying jobs and careers that require more than high school graduation. As well, universities are finding that people are returning to university after several careers to pursue careers that are rewarding and financially viable. In addition, as the standards for teacher certification are being toughened, faculties of Education are experiencing a glut of teachers who are returning for upgrading. On the other side of the tougher regulations is the increase in teachers retiring rather than having to return to university with two or three years of teaching left before their retirements. In the United States, it is predicted that the greatest teacher shortage in its history has begun and will reach a climax in the next five to ten years (Pipho, 1998) to the extent that there will be a 21 percent growth in teacher demand in the United States in the next decade (The National Council for Education Statistics, 1994). This demand means a projection for 200,000 teachers per year for the next decade. In other words, by 2006, the United States will require 2,000,000 teachers in order to meet this demand.

Australia is also facing a looming teacher shortage which may not be able to be met by university graduates and teachers-on-call. Indeed, when there is an increase in student enrollments, teacher retirements, and the number of "discouraged" teachers currently in the workforce, the supply of university graduates and existing supply teachers is insufficient to meet the demand. The Australian Council of Deans of Education (1998) predicts shortages in both elementary and secondary teachers in each of the next five years up to 2004. Specifically, they predict a shortage of 347 elementary teachers in 2001 and 1,439 in 2004, and a shortage of secondary teachers of 1,467 in 2001 and 3,097 in 2004. Lastly, the aging teaching force is expected to result in approximately 3,000 teachers retiring during the period ending in 2004.

In Canada, the situation is certainly no different. The 1995 Labour Force Survey by Statistics Canada showed that 60.8 per cent of the teaching force in Canada were over 40 years of age. (In British Columbia this percentage increases to 67.57—the highest in Canada with Quebec second highest at 65.3 per cent and Ontario third highest at 60.0 per cent). Thus, because most teachers retire at or around 60, Canada will face a serious teacher supply and demand problem in 2015 created by its aging teaching workforce. Not surprisingly, recent studies by the Canadian Teachers Federation (1999) and Statistics Canada project the possibility of a teacher shortage early in the next millennium in different regions of Canada. In addition, it is predicted that the number of bachelor degrees granted in 1997 across Canada will increase from the 1997 rate of 15,209 elementary and secondary degrees to the extent that an additional 10 to 20 percent will be graduated; however, even this increase will not meet the demand. Particularly affected is the province of Ontario, a finding confirmed by a recent study by the Ontario College of Teachers (1998) which predicts a dire teacher shortage in that province by 2003. For example, teacher retirements in Ontario increased from 4,650 in 1997 to more than 10,000 in 1998, with 41,000 projected to retire in 2003 and 78,000 (almost half the province's teaching force) by 2008. However, the number of applicants for teacher education programs in the province has declined from 20,000 in 1990 to 8,000 in 1997. Compared with the number of degrees granted, over 6,000, in Ontario, there is an immediate shortage in this province. Thus, shortages are predicted province-wide at both elementary and secondary levels, particularly in specialized areas such as French-as-a-second-language (FSL), Mathematics, Sciences and Technology, and Computer Technology.

The British Columbia Teacher Supply and Demand Consortium has been considering issues of supply and demand in British Columbia for several years. In May 1998 the committee called for further research into the patterns of teacher supply and demand. The committee then approved a proposal for a pilot study utilizing a qualitative approach in December 1998. The research plan proposed site visits for the purpose of interviewing key informants at each location. The research plan included site visits to three agencies with a Province-wide mandate; the Ministry of Education, the British Columbia College of Teachers, and the British Columbia Teachers' Federation. In addition, board officials and union presidents were to be interviewed from a purposive sample of twelve school districts selected according to size, stability of enrollment and geographical location. The research team believed that face-to-face interviews would ensure a timely and rich data source. This would provide the committee with a better understanding of the dynamics of teacher supply and demand at the regional and local level. The results of the pilot study are beyond the scope of this paper(Echols, Grimmett, & Kitchenham, 1999a; Echols, Grimmett, & Kitchenham, 1999b); however, a discussion of the rural school districts surveyed will constitute the body of this paper.

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[45] Parts of the paper have been previously presented in verbal and written form to the British Columbia Teacher Supply and Demand Consortium by Drs. Frank Echols, Peter Grimmett, and Andrew Kitchenham.

The Canada Goose Phenomenon

Historically, British Columbia has had chronic shortages in certain subject area specialties. Typically, teacher education programs have had a shortage of applicants in secondary Math, Physics and Chemistry. There generally has been a surfeit of applicants in Social Studies, English, Physical Education, and Humanities and, to a large extent, Biology. The demand for English as Second Language teachers is a more recent phenomenon and one that predominates in the metropolitan and some urban areas; however, the demand for First Nations Language and First Nations Culture teachers is strongest in the rural school districts. Shortages in the field reflect, in part, the characteristics of those who choose to enter teacher education programs. Sixty-two percent of new graduates certified in 1993 and 1996 have Bachelor of Arts degrees. Degrees in the Liberal Arts do not have direct linkages with the occupational structure that are more characteristics of Math and Science[46] majors. Teaching offers an attractive opportunity to university graduates struggling to obtain employment. It is relatively easy to be accepted into a program, the technology is not complex, and it provides a source of income. Although a number of individuals are committed to the teaching provision at an early age, a number make a late decision to become a teacher. Earlier research indicates these late decision-makers are more likely to be attracted by the extrinsic rewards of teaching rather than the intrinsic rewards. Recruitment to the profession through volunteer entry to teacher education programs appears to be a "passive" approach to teacher supply. This passive approach to the selection and recruitment of teachers may perpetuate some of the more immediate supply problems at the secondary level that we have discovered in British Columbia's schools. Additional factors such as the economy, government legislation, the number of teachers moving into the province, and immigration from other provinces and countries are unknown variables that have a significant impact on teacher supply and demand.

The research team bore in mind many of these factors when they began interviewing the Registrar of the British Columbia College of Teachers, the Research Department of the British Columbia Teachers' Federation, the Ministry of Education, and each of the twelve school district personnel. The primary responsibility of this researcher was to travel several hundred kilometers to two rural school districts and interview school district personnel. It is during these interviews that the "Canada Goose" phenomenon became apparent.

As many people are aware, each year, tens of thousands of Canada geese fly south for the winter so that they can enjoy a better quality of life. So, too, it would appear that as the need for more and more teachers increases, so will the exodus from rural and isolated school districts. If one looked at the predictions for teacher shortages in British Columbia, which range from 5,000 to 20,000 by 2005 depending on the aforementioned factors of early retirements, an aging teaching population, university graduates, and economy swings (Echols, Grimmett, & Kitchenham, 1999a), it is abundantly clear that there will be for more jobs available in the province, in general, but more importantly, in the metropolitan and urban centers. In short, the teachers will flock to the areas that need teachers and that have amenities such as hospitals, theatres, police, fire, and ambulance forces, teacher resources and support, universities, and, probably for the shopping facilities.

Although it was outside the parameters of the study, this researcher interviewed rural teachers in secondary and elementary schools. Some interesting comments were made by these extremely dedicated teachers. As one teacher said, "Once I have put in two or three years in this district, I am out of here." When queried as to where he would go, he stated that he would go to the Lower Mainland and be a substitute teacher until a full-time contract was offered. Another said that she loved teaching in the north but felt that she needed more resources as a teacher but she also believed that she needed to travel a great distance to get further teacher training. When asked if she had those two needs met would she stay in this district, she replied that she would much rather live in a metropolitan area just to be close to crowds! This researcher asked an entire staff about the possibility of "migrating" to the urban areas should vacancies arise and the responses were virtually unanimous: "in a shot"; "tomorrow"; "you better believe that I would be gone"; "sadly, yes, I would go south." A more detailed response brings out the sentiment of many rural teachers with whom this researcher spoke: Don't get me wrong. I love teaching in [this district] and have lived here for fourteen years but I also know that the metro areas offer far more for me and my family than here in [this town]…. I mean if an urban or metro school district wants to be pay me the same pay cheque every month as I get here then why would I want to stay here.

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[46] A member of the Physics department at the University of British Columbia indicated that they graduate approximately 250 students a year among their various programs. Graduates can usually command a starting salary in the $70-80,000 range.

… Sure the cost of living is higher in the city but so is the standard of living. Right now I drive for three hours round trip to get from my house to my school and back so I could live in the suburbs in Vancouver and commute to four school districts and drive for less time. … *The rural school districts have to get their act together and start offering some reasons to stay* (emphasis added).

These sentiments were heartily shared by most of the rural teachers on three different school staffs in two different school districts. The notion that teachers will leave a rural school district to find work elsewhere is certainly not new; however, the vast numbers of teachers who will leave rural areas to teach in metropolitan and urban districts is great. In short, the future for rural schools and children appears to be quite bleak in the next ten years.

Conclusion

So what are the answers if we know that the rural school districts are going to suffer greatly when the teacher shortage hits in British Columbia? The first answer comes from a superintendent of a large rural school district: "Give us more money." Certainly, money would be a major incentive for teachers to stay. It was a consistent feeling that teachers enjoyed teaching in rural districts but that they really felt a sense of inequity as they could teach in another district and earn the same amount of money. To be sure, some of the general incentives in the United Kingdom and New Zealand may be modified to attract and retain rural teachers. Examples in the United Kingdom include 325 million dollars to boost recruitment, $12,500 to train teachers in key shortage areas (i.e., math and science), 25 million dollars for those subjects where shortages occur in the secondary levels, providing on-the-job training for teachers in specialty areas, implementing a system of merit pay regardless of where the school is located; in New Zealand, some general incentives are scholarships to future teachers of high demand subjects, financial incentives for high-need schools and teaching areas, and money for relief teachers orientation and training (Ontario Ministry of Education and Training, 1999). Another superintendent suggested another incentive for rural teachers would a university to serve the needs of the rural school districts: "Those aren't the kind of recruits we need or find are the most successful here. I think we need a program in the north. I think UNBC would be well advised to get with it and offer an elementary teacher education program." That is, if a university were opened in the northern part of British Columbia, many teachers would feel support was present for inservice and professional development. A corollary would be that teachers trained in rural education in a rural setting would most likely stay in a rural district. In addition, a university in situ may also create opportunities for graduate work which would mean many teachers would not have to travel out of district to receive graduate training. Lastly, linking years of experience with financial incentives was another salient finding from this study. In other words, a teacher moving from the first step on the grid to the next (i.e., second-year teacher) would receive a pay increase of two thousand dollars; however, a teacher moving from step five to six, six to seven, or seven to eight would receive a pay increase of five thousand dollars. It would be worthwhile for the teacher to stay six or seven years as the financial incentive removes the inequity possibility with more urban districts as teachers tend to receive an average increase of two thousand dollars for each year of experience. In sum, there is a need for teachers to be attracted to teach in rural school districts and a stronger need to retain teachers in rural school districts because teachers will be leaving and few will be filling the vacancies when there exist so many other positions in urban and metropolitan districts. The challenge in the few years that are left before the impending and massive teacher shortage occurs is to find answers and incentives. Some Canadian geese do stay home for the winter and many survive, if they have the desire.

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Contesting Spaces And Places: Conflicting Geographic Imaginaries In The Countryside March, London, March 1, 1998

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Abstract

The 1998 Countryside March in London succeeded in putting rural concerns near the top of the British national agenda. The national media was filled with extensive reportage and analysis of the various concerns, the organisation of the protest, and the actual event itself. The marches succeeded in calling attention to claims that rural needs are being ignored by an increasingly urban national government. But who are these countryside people and whose concerns are countryside concerns? Are they the wealthy country land owners? Farmers? Ex-urban commuters? Hunting advocates? Farm labourers? Rural entrepreneurs? Back-to-the-landers? The Countryside March marks a unique coalescence of otherwise competing factions within rural Britain. The extent of the heterogeneity of opinion and imagination can be seen in the media reportage, which contrary to common practice, did not produce a single national representation of the issues or of the march itself. This study will examine that media representation to identify several important strands of imagination and interpretation and to point out the difficulties researchers and policy makers face when attempting to come to terms with rural issues in the urbanising countryside in the late twentieth century.

Rural places in developed nations occupy a contradictory place in the popular imagination. On one hand, for many they are destinations of desire, reserves of naturalness, sources of recuperation from the morbidities of metropolitan life. On the other they are also seen as reservoirs of rural deprivation, isolation and banality. Beyond binarisms, the range of meanings attached to rural places extend across a continuum from morbidity to sublimity. In northern Europe, rural places face a unique set of problems which stem from competing imaginaries of characteristics which are attached to rural spaces. These imaginaries cast the rural as at once both places of desire and of repulsion (Cloke & Little, 1997; Urry 1995; Williams 1973).

In addition, rural places face concrete, material problems -- problems of environmental degradation, problems of excessive demand for rural amenities, of declining services and changing employment opportunities, and of changing demographics and circumstances (Marsden, Murdoch, Lowe, Munton, & Flynn 1993). Attempts to 'preserve' countrysides change the very spaces to be preserved (Cloke & Thrift *in* Marsden, Lowe & Whatmore 1990).. Many countrysides conceal rural poverty and deprivation behind a facade of wealthy ex-urban society (Cloke *in* Philo 1995). In particular, rural policy-makers are faced with difficult choices in an attempt to resolve conflicts between existing rural populations and a growing ex-urban presence in rural areas.

The material problems faced by rural areas are vexing enough for policy makers. However, what could be relatively simple decisions about deploying resources for infrastructure provision or about limiting the amount or type of development taking place in rural places, are, in a democratic society, complicated by the need to take in to account the beliefs, aspirations and desires of a population with deeply conflicted understandings of rural life. These beliefs about the nature and purpose of rurality both support and deny very different sets of policies about rural development and preservation and lie at the heart of problems facing an urbanising countryside in the developed world.

This paper looks at this situation by closely observing one particular fissure in rural-urban relations as expressed by the Countryside Rally (July 10, 1997) and the Countryside March (March 1, 1998) in which, respectively, 80,000 and 180,000 'rural' people marched into London to protest what they saw as an urban attack on 'country' ways of life. It does so in order to tease out the strands of belief and meanings which underlie British notions of rurality in order to illustrate both the strength of such beliefs (and their concomitant impact on rural policy) and to illustrate the multiplicity of beliefs which can flourish when the meaning of a place becomes detached from its historical and material existence.

Geographic Imaginaries

All places exist as both material spaces and spaces of human aspirations and cognitions. Donald Meinig states that "every nation has its symbolic landscapes. They are part of the iconography of nationhood, part of the shared ideas and memories and feelings which bind a people together" (1979, 164) The countryside is clearly one such symbolic landscape. As such what it *means* is as important as what is empirically present. The spatial and the social are not two separate entities, but are inseparably intertwined, each constituting the other (Massey and Harvey 1996, Massey 1993, Barnes 1996). Our definitions of ourselves and the sociality we are part of are affected by where we come far and where we are, and in turn, affect what we do in, and to those places. In other words, our beliefs and world-views -- our geographical imaginaries -- of places affect what we believe does, and should happen in particular spaces.

Many writers have explored the role of the rural in British imaginaries, from Raymond Williams' explorations of the role of the pastoral in English literature and popular imagination (1973), to current commentators such as John Urry (*Consuming Places,* 1995), who focuses directly upon the exploitation of the countryside as a space of consumption and recreation[47]. And yet such popular imaginaries continue to exert as much social force as they ever have. How do these geographical imaginaries function and how do they exert such force upon the way we see and interact with particular landscapes? In order to understand one specific example of this, I will look at the English Countryside.

Discursive formations.

The myriad meanings, aspirations and emotions which constitute the produced entity called the English Countryside can be called a *discursive formation.* A discursive formation is a constellation of meanings which emerge out of collective representations -- representations performed in the inhabited life-spaces of communities, communities local and extra-local to the discursive formation. A *discourse* is a set of meanings out of which a discursive formation is constituted. From the study of semiotics, the term points to meanings formed or *signified* by a sign or symbol. The relationship between a sign, and what is signified is socially constructed and can have little, or indeed nothing to do with the content of the material sign. Indeed the primary meanings of a sign vary by discourse.

Discourses are open-ended linguistic structures constructed out of *speech-acts*, the practices of signification, not just words, but acts themselves, and provide a framework for understanding the world. They are not only *how* we communicate, but also:

> are both enabling as well as constraining: they determine answers to questions, as well as the questions that can be asked. More generally, a discourse constitutes the limits within which ideas and practices are considered to be natural; that is, they set the bounds on what questions are considered relevant or even intelligible. (Barnes & Duncan 1992, 8)

Discourses consist of ways of speaking (or writing or other systems of representation) which are framed by the limits of meanings of the terms used. Thus words have different meaning according to the discourse within which they appear. *Wealth,* for example, conveys a different set of meanings, consequences and actions whether used within an American discourse of capitalism or the capitalism of mid-nineteenth century British Protestant capitalism.

Discursive formations are iterated, and the iteration is an important a factor in the encompassed meanings as well as historical prepositions. The iteration can be a speech act (mediated or live), a physical act, or even the absence of an act, but discursive meanings come from communication within a social milieu. Each time a formation is iterated, its particular constellation of meanings is constructed anew, and so discursive formations are always in flux even though partially constituted from existing shared historical meanings. Indeed, when derived from differing discourses, the same discursive formations can have very different connotations. This is how the same signifier can be used to represent two very different sets of qualities and this lies at the root of conflict over the meanings of a sign like the Countryside.

Discourses are one means by which social actors produce social life. To Anthony Giddens (Cohen 1989; Giddens 1984), they are the stuff of social action. To Giddens, social structures do not exist as independent entities but are iterated through the *praxis* of social actors. Meaning, distinction and power are not objects or platonic forms, but rather are processes, only extant when being expressed, whether consciously or not. Discursive formations are the constellations of meanings -- meanings of existence, entitlement, relationship and power which are constituted out of *acts* of representation, iteration and interaction. With the act of production, or reproduction, the discursive formations appear to have an existence of their own -- they seem to influence, affect and alter other things. They have this apparent concrete-ness because they mask the naturalising power of discourses. Formations become associated with particular social institutions and the meanings associated with the institutions become associated with the formation. Thus some discourses of English national and regional identities are associated with the countryside. People in powerful groups can appropriate a sign as a symbol of their identities, and this naturalises their personal entitlement to the qualities associated the symbol. I shall explore this naturalisation and entitlement further when looking at who claims a voice in the debates about the countryside.

The appropriation of discursive formations by groups in society completes the process of emptying-out the original content of a sign, detaching the sign from its original meanings, and naturalising the relationship between the signifier and its new social content. The empty sign then acquires what Roland Barthes calls a 'second-order meaning' (1986, p. 122). This is Barthes' definition of 'myth'. When the signifier is a real material object -- in this case a landscape -- the history, and materiality of the object are distorted by the emptying-out process of *appropriation*. Thus an object becomes alienated from it's histories, 'real' and constructed. The process of alienation is central to the process of creating these second order meanings and to study the process of that alienation and investiture is to study the power relations around the object, power relations sometimes sited far from the actual object.

In this case, the signs we are interested in are those of the English Countryside. What is signified are the diverse meanings presented by influential representations of rural England, whether literary, cinematic, political or other. Although the exact composition of meanings in the discursive formation called English Countryside vary from individual to individual, and across time, there is nevertheless a core of shared meanings. Thus when we encounter the sign 'English Countryside' we think we know what it means, and to an extent we *do* share common meanings which we generally will agree upon, or at least recognise, even as we contest them.

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[47] see also, Bunce 1994; Harrison 1982; Newby 1979, 1988; Marsden Lowe & Whatmore 1990; Halfacree in Cloke & Little 1997; Cloke, Doel, Matless, Phillips and Thrift 1994.

Space-myths.

Rob Shields uses another term, *space-myths*, to describe this phenomenon. His space-myths are an example of the process of alienation and investiture. Space-myths are "spatial beliefs, theories, and practices within the matrix of culture" (199, p. 162) These symbolic landscapes come to represent much more than just the territory they occupy. Discussing one such symbolic landscape-- the Canadian North -- Shields asserts that they have "been appropriated as one symbol of specific Canadian nationalistic discourse...." (p. 162). In a like manner, the English Countryside has also been appropriated as a symbol of Englishness.

Shields discusses the discursive formation of the Canadian North in his *Places on the Margin* (1991). He could be talking about the English Countryside when saying,

> The ideological 'True North' is an empty page onto which can be projected images of the essence of 'Canadian-ness' and also images to define one's urban existence against... The North is less a real region signified by a name and more a name, a signifier, with a historically-variable, socially-defined content. (p. 165)

Looking at the welter of representations of the countryside and the way in which the countryside is implicated in political ideologies and personal narratives and myths, it too operates as a blank slate upon which can be projected images of the essence of 'Englishness'.

This is not to say that neither the Canadian North nor the English Countryside exist as places, places which can be subjected to empirical examination. Indeed, in the case of the English countryside, to do just such a thing will be a necessary part of this study, if only to indicate how discourses of rurality have become detached from the actualities of what is present on the ground. However those localities, those places, are as much socially constructed as they are physically constructed. Yet the two are related and it is that relation -- between beliefs and imaginings about the countryside (constructed out of representations, ideologies and place-myths) and political relations about identity, land-use and conflict which is central to my argument.

In other words, to quote Cosgrove and Daniels (1988), "A landscape is a cultural image, a pictorial way of representing, structuring or symbolising surroundings" (p. 1). Again, landscapes are also, of course, material artefacts. Nevertheless, if we regard a landscape as something which is constructed by human inter-*action*; interaction between humans, and between humans and the physical environment, then it is inescapable that landscapes are more than isolated material processes -- the shapes they become; what occurs within them; the human and non-human lives within them are strongly constituted out of human beliefs and endeavours. Thus, the presence or absence of material features within a physical landscape are signs of a contested economic, political and cultural terrain. A landscape is, therefore, amongst other things, a *representation* of human ideology, action and power. It is in this sense that we can call a landscape a discursive formation.

To recap then, just as there are multiple ways to quantitatively define rurality, there are multiple sets of symbolic meanings of it. The 'myth' of the rural idyll; the 'rural ideal'; and the symbolic landscape of rural England are constructed out of social relations expressed as history, representation and actions. The sign of 'countryside' has come to be alienated from its material origins and has been appropriated by a number of different social institutions and actors, and invested with sentiments and meanings far removed from the land itself. Nostalgia for an innocent childhood and a state of Edenic grace, depicted by children's literature; appropriation by an ascendant Victorian bourgeoisie; investment with rhetorics of national identity: these are examples of specific socialisations which have been factors in the creation of the myth of the rural idyll and the place-myth of the countryside. I now will examine some of the specific sets of meanings which constitute the contested terrain of the British countryside in the 1990s in order to identify some of the fault-lines over which these differing geographic imaginaries are opposed.

The Urbanising Countryside in England.

Through time and social action the English countryside has come to represent many things. Historically, it has been located at the heart of English nationalism (Williams, Bunce), and as the source of all that is good and moral about Britain [48]. At the same time, the landed aristocracy symbolised the heart of the English caste system, their country seats being the heartlands of reactionary resistance to democracy, justice and change. Country yokels became symbols of backwardness and febrility at the same time as representing the positive qualities of hard workingness, plain speech and honesty[49].

Over time there has emerged a set of meanings of the city and the country which have set them up as binary opposites, and this duality still obtains in modern-day

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[48] witness John Major's countryside of 'warm beer and the sound of cricket bats'

[49] for example, consider the gardener in Lady Chatterly's Lover by D.H.Lawrence.

England. In this schema, the city, whilst vital, is degenerate, addicted to fashion, a sink of vice, a destroyer of health and a corrupter of morals; it makes men effete and women adulterous The countryside, by contrast, is a land in communion with nature. It is a place of health, beauty and, in contrast to the city, unchanging (Williams, Bunce).

It is this particular constellation of meanings which underpin the protests of the Countryside Rally and Countryside March. In addition, the opposition of the urban and the rural is mirrored by two different ways of understanding rural land. To rural landowners, farmers, and workers, the rural landscape is a landscape of production -- a place to produce wealth from the commodities produced on the land, whether crops, cattle, or timber. This orientation towards production means that even when commodity production becomes impossible, the land becomes the ultimate commodity and can be developed for wealth through commercial or residential development. Amenity values such as beauty or a `natural' environment take a second place to the realities of producing a living off the land.

From an urban perspective, the rural landscape is primarily perceived and valued for its amenities. Amenities such as beauty, cleanness, `naturalness'. Its value lies in the consumption of these amenities themselves for recreation or as a resource for residential choice. Thus, productive activities which interfere with amenity consumption degrade the value of the rural landscape and therefore must be regulated to assure that the important amenity values remain sustained.

To put it another way, one group sees the land as a space of production, and another as a space of consumption. This is not just an academic distinction. A quote from the reportage of the Countryside March will indicate the depth of feeling and understanding these discursive formations engender.

> "For the other side [ruralists] the city is degenerate, addicted to fashion, a sink of vice, a destroyer of health and a corrupter of morals; it makes men effete and women adulterous....The countryside, by contrast, is a land in communion with nature. It alone has a landscape. Those fields and villages reserve the traditions and the heritage of the nation. It is healthy and its colour is ruddy -- the hue of roast beef and of the independence of old England. Children may roam it in peace, naming flowers and climbing trees." (David Aaronovitch. "Arcadia comes to the Big Smoke, to tell its well-worn tale of woe." The Independent Feb 27 1998 p 21.)

It is this dichotomy, which now affects the urbanising countryside in England. As the numbers of ex-urban migrants to the countryside grows and the number of rural people employed in productive activities such as agriculture declines due to increasing efficiency and declining quantities of land in production, a conflict has arisen between those who value the land for its productive potential and those who value it for its amenities. Increasingly, ex-urban middle-class incomers are beginning to mount campaigns and join local governments and heritage planning boards in order to make sure that the countryside conforms to their geographic imaginaries of what the rural idyll should be. This class-fraction tends to be of a high socio-economic status, university educated, media-literate and experienced at raising its voice in urban and national politics. In contrast with working rural people, these newcomers not only know how to get their voices heard, but they also have an expectation that if they speak up, they *will* be heard. This has brought about numerous clashes over land-use issues such as quarry expansion, new housing development, roads building and land development for shopping malls, etc. On the one hand, such developments bring needed wealth and jobs into the local environment, on the other, they pose a physical blight upon the aesthetics of naturalness which attracted the newcomers in the first place. Thus, repeated all over England, the countryside has become the site of conflict between those who see the land as a resource for production and those who see it as a set of amenities to be consumed.

The Countryside Rally and Countryside March.

On March 1st, 1998, somewhere between 150,000 and a quarter of a million demonstrators marched through central London as part of what was called the Countryside March. This event marked a high point of rural protest against changing conditions in the countryside and apparently featured a coming-together for mutual protection and protest, of a coalition of rural actors from agricultural workers to landed aristocracy. It was not an isolated event, however, being preceded by the Countryside Rally on July 10, 1997, which featured 80,000 marchers into London, and numerous protests by the National Farmer's Union and other farming lobby groups over the importation of foreign beef supplies which undercut the production prices of British beef.

The Countryside March marked a significant move by rural interests onto the public stage and was aimed to put pressure (quite successfully) on the New Labour government. It's ostensible purpose was to pressure the government to reconsider some of its rural policies, such as the siting of half of 4.5 million new homes on greenfield rural sites, the turn towards free markets and declining subsidies in agriculture, the shrinkage of rural service provision and, most importantly, a ban on fox and stag hunting with hounds.

While there is no doubt that the Countryside March represented a significant flexing of rural muscle on the national political agenda, a detailed and thorough analysis of the genesis, organisation, articulation and representation of rural interests in the March will reveal that within, as well as outside of the countryside movement, there is a chaotic plethora of interests, positions and imaginaries about the countryside which were expressed through this protest, with the result that it achieved far less than it wanted to, and indeed, far less than was apparent immediately after the March.

Origins of the Countryside March

The March was orchestrated by the Countryside Alliance (CA), a lobbying group which emerged out of the pro-hunting lobbies which grew in response to the increasing levels of protest and regulation of hunting in the 1980s and 1990s. A brief exploration of the origins of the CA will illustrate the pro-hunting origins of the group.

The Countryside Alliance was formed in 1997 from a merger of the British Field Sports Society (BFSS), the Countryside Business Group (CBP) and the Countryside Movement (CA website, 1998).

The British Field Sports Society, the 69-year old voice of hunting, shooting and fishing in Britain has 80,000 members and 781 affiliated groups. It enjoys wealthy and influential support from country landowners, gun manufacturers and the sports goods industry. Dr. Charles Goodson-Wickes, the chairman of the Countryside Alliance , and a Tory MP until the last election, is also chairman of the BFSS (Beckett 1998).

The Countryside Business Group was formed by Eric Bettelheim (ironically, a Chicago-born lawyer and Vietnam War protest organiser) in response to a 1992 speech by Enoch Powell suggesting that field sports were a civil liberty which was rapidly coming under threat. Bettelheim set up the CBG to influence policy in favour of field sports, creating a well-funded modern political lobbying operation. He signed up 10 founding members of the group, each prepared to pay up to £10,000 Supporters of the CBG include Lord Steel of Aikwood, chairman of the Countryside Movement; the Duke of Westminster, Britain's richest man and the underwriter of the Countryside Movement; Sir Alick Rankin, chairman of General Accident and director designate of the new Countryside Alliance; and Jonny Weatherby, chairman of the family firm which runs British racing.

The Countryside Movement, launched in 1995 with a $400,000 grant from the BFSS was backed by wealthy landowners, including Britain's richest landlord, the Duke of Westminster, blood sports groups and a gun importer. Again, its purpose was to lobby on behalf of rural pursuits, particularly hunting.

The Countryside Alliance, formed in March 1997, is an amalgamation of the Countryside Movement, the Countryside Business Group and the British Field Sports Society. (Woods 1998, Burrell 1998, Beckett 1998, n.a. The Observer March 1, 1998)

The initial Countryside Rally came about in response to the election of the New Labour government in 1997. It was expected that New Labour would produce an anti-hunting bill and the BFSS decided to pre-empt this by organising a mass pro-hunting demonstration on July 10 of that year -- the first date which a Private Member's Bill on the issue could be tendered. However, experience from a rally organised by the Sportsmen's Association against gun control (which only attracted 20,000 demonstrators) indicated that broad public support could not be mounted around hunting alone. Thus the decision was taken to call the July 10 protest the "Countryside Rally" and to cast it as in defence of the countryside, not of hunting per se. (Woods, Burrell). In the event, the Rally was deemed a success as it attracted approximately 80,000 people to a rally in London's Hyde Park where they listened to speeches from politicians, writers, actors and representatives of field sports organisations.

However, a Private Member's Bill was introduced by the Labour MP Michael Foster to ban hunting with hounds later that year. An open vote was called for and polls indicated that the majority of the House of Commons would support the Bill. Indeed, the Prime Minister said that he would personally support such a Bill. In response, another protest was planned for March 1st, 1998. This was the Countryside March.

Conflicting stories and conflicting imaginaries.

As seen above, the Countryside Alliance grew out of the concerns of supporters of hunting -- financed by wealthy businessmen and peers and supported by working country people who benefited from the hunts. Yet, they constructed the debate about hunting as an urban-rural conflict. In doing so, they managed to align concerns about hunting with other concerns about rural problems (Woods). The official position was that the threat to hunting was a threat to the 'rural way of life', positioning it along side rural deprivation and unemployment, the transformation of rural villages by wealthy newcomers and the decline in the fortunes of the family farm. Indeed, the Countryside Alliance's mission statement regarding the March stated that "This initiative arose as a response to the frustration and concern felt by country people against the threats posed to the countryside and their jobs, by politicians and urban influence" (Porter 1997 p 2). The Alliance's Web site states "The Countryside Alliance brought the Countryside March to London on 1st March 1998....to voice their concern for the future of the countryside....[and] have reinforced our duty to fight for the interests and wishes of rural people" (Countryside Alliance). It goes on to identify eight issues which it claims lies at the heart of its campaign: "countryside access, agriculture, rural employment, rural services, rural small businesses, housing and development, conservation, and animal welfare" (CA). No where does this Web page mention the right to hunt. Rather, the concerns expressed are those of rural people in general, in opposition to urban influence, the kind of morbid influences detailed in the earlier section of this paper which are believed attached to urban life.

That the CA's interests remain firmly rooted in promoting hunting can be seen by another page on their website, however. In a list of recent news -- a compendium primarily of CA press releases with a few news articles it wishes readers to see, there are 74 releases dated between January 10, 1998 and November 4, 1998. Of these, 43 are directly about the campaign to assure the right to hunt. Additionally, its 'Archive News' page features 11 of 13 press releases which are about the pro-hunting campaign.

By framing its pro-blood sports message within wider imaginaries of a productive countryside under threat, the CA was able to mobilise such a large turnout for the Countryside March on March 1st. However, as Janet George, former press spokesperson of the CA, since resigned, states: "'You can unite different interests for a march or a rally, but when you do it in an organisation it creates problems. A membership organisation can't represent conflicting views. And rural Britain is not one big happy family. The great and the good in the Countryside Alliance say they're concerned about rural schools. Their kids go to Eton." (Beckett, Aug. 13, 1998).

Indeed, after the March, the issue faded from the public stage quite quickly. The Private Member's Bill failed due to an executive government decision not to give it time for reading in the House. And press reports of the CA, and rural problems reverted to the usual desultory level.

A major factor in this are the conflicting imaginaries of the countryside which formed the uncomfortable alliance which produced the Countryside March. Rural society is not homogenous, even if one of the geographic imaginaries of rural society is that it is. As John Urry states, "Studies of rural communities have shown that there may be considerable conflict and opposition in such places, especially around status, access to land and housing and the nature of the 'environment'. In Britain many rural areas have become increasingly populated not by those employed in farming but by urban newcomers who have pushed out existing poorly paid farm labourers or their children (1995, p. 10). So, within existing communities, within communities of newcomers, and within the geographic imaginaries of urban communities, there remains much conflict over what the rural is, what it should be, whether it should be preserved and if so, how it should be preserved.

Representations of the Countryside March.

The differing geographic imaginaries can be seen in the press coverage of the Countryside March (and Rally). Normally the English press gives a fairly homogenous view of events, given the overt political aspirations of the individual newspapers. Whatever the political interpretation, the basic stories are usually very similar whether reported by the right-wing Telegraph and Times or left-wing Independent and Guardian. However, such is the nature of conflicting imaginaries that the papers were not able to produce a coherent account of the Countryside March. To one paper it was the product of rich businessmen and aristocrats, in another, of ordinary working country people. In one, the issues were about rural loss and deprivation, in others it was about the right of elites to maintain their elitism. To one the political issues were about the right to barbarically kill foxes, to another about the rights of a minority to resist a fascistic dictatorship of the democratic majority. As the following section will indicate, just like the rural countryside itself, there seems as many interpretations, imaginaries and sets of meanings as there are people with interests in the rural environment.

The headlines

The headlines alone are a good indicator of the contradictory postions of the papers. The following is from a small selection of reports covering the Countryside March, paired around the issues (and imaginaries) reported.

Hunting is our art, our life, we'll fight for those things with all our strength –
The Daily Telegraph, July 11, 1997
Aggrieved, unpleasant land –
The Observer -- Feb 22, 1998
Living in the country doesn't mean I like hunters or hunting –
The Independent, March 1, 1998.

Faithful gather in countryside blood feud –
Guardian July 11, p5
Everyone's going to town on their own hobbyhorse-- they won't be marching to the same tune –
The Observer March 1 1998 p 8-9.
Hunt for sanity in countryside debate –
The Guardian July 11 p 19

Labour puts on the Barbour and wellies -- The Sunday Telegraph, March 1, 1998.
The Barbourians are at the gate --
The Independent on Sunday March 1,1998
The country comes to town –
The Daily Telegraph -- July 1, 1998

Country fights for tradition –
The Guardian July 11, 1997 p1
The issues: 'grand coalition' conceals fight against hunt ban -- The Guardian March 2. 1998.

The day the city became a shire --
The Guardian, March 2, 1998

When the country was set alight --
The Independent, Feb. 28, 1998
Countryside march 'half claimed size' –
The Independent, March 4, 1998.

Tories at the head of march –
The Guardian, March 2, 1998.
Hague denies Tories are hijacking rally –

The Sunday Telegraph, March 1, 1998.
Rural rally marchers '80pc Tory voters' –
The Guardian, March 3 1998.
Labour bows to country people power --
The Times, March 2. 1998

Squires and grooms join the ranks –
The Times, March 2. 1998
The Journey: A few were given tickets because their pay is so low –
The Guardian March 2, 1998

Arcadia comes to the Big Smoke to tell its well-worn tale of woe –
The Independent, Feb. 27, 1998.

Countryside under siege cries for help.
The Sunday Telegraph, March 1, 1998
Rural lobby rides high –
The Guardian, March 2, 1998

Rural march hijacked by 'dark forces' --
The Independent, Feb. 27, 1998.
Listen to them: the defence of individual liberty gives this march its integrity –
The Sunday Telegraph, March 1, 1998.

From the headlines, and the subsequent copy in the articles, the various ways of viewing the countryside can be reduced to a few major oppositions. The first is over whether the March represents the desires of all rural residents or just a particular elite. For example, John Vidal reports:

> Why are we marching? Why, to tell those people who haven't a clue about the countryside that they can't just walk over us. This is much more than hunting,' says David Jones of Llanidloes, who has walked all the way [to London]. 'Cities, these days, think we don't exist'. The hunting thing is just part of the problem. We're treated like nothing. They've closed our hospitals, cut back on our services, everything is more expensive for us. The countryside is becoming a sink for the poor. They are pushing us further and further' (Vidal July 5, 1997 p 3).

On the other hand, Henry Porter reports in the Guardian,

> The mission statement of the countryside marches that converge on Hyde Park in London today reads as follows: 'This initiative arose as a response to the frustration and concern belt by country people against the threats posed to the countryside, and their jobs, by politicians and urban influence, through prejudice, ignorance, and diminishing rural representation.'
> Nowhere is hunting mentioned, which seems at the very least to be an oversight and, at the very most, ludicrously optimistic spin. Hunting is the primary issue and behind it, rather than in front, come all the resentments of the countryside -- the cancelled bus services, the merged schools, the closure of cottage hospitals, the plans for large-scale housing development and the endless demands of the ramblers, mountain bikers (Porter July 10, 1998 G2 section, p2).

Further, the Observer reported that,

> Today the gentry, their employees and tenants -- some provided with free tickets for London -- will protest against a government accused of threatening the countryside. The irony is not lost on some in counties such as Northumberland where the landscape is sometimes threatened by landowners themselves (The Observer, March 1, 1998 p 8).

These are reports from the same newspaper (with the Observer operated by the same trust as the Guardian) so one would expect a similar political orientation, if not exactly standardised reportage. Yet one claims that it is the common people who are the source of this protest, the other, the hunters, another wealthy gentry.

Likewise, a leader in the Independent stated that,

> The credibility of today's Countryside Alliance demonstration has already been badly undermined. It has been conspicuously unsuccessful so far in presenting a consortium driven by land-owners, farmers and big businessmen -- pushed and prodded by bizarre allies such as the Ministry of Defence and gun lobbyists from the United States -- as a spontaneous uprising of workers and peasants. If a Labour government fails to confront the landed and capitalist interests that wish to prevent walkers from rambling freely in designated and uncultivated country, then no one will. (The Independent on Sunday. March 1, 1998. p21).

Whereas the Sunday Telegraph's leader claimed that,

> Today's Countryside March brings to London not the massed forces of an aggrieved vested interest, but a richly diverse range of Britons united in their desire to preserve the rural way of life. Huntsman is marching alongside environmentalist, land owner alongside rambler, New Age radical alongside tweedy patrician....Such contradictions should not be discounted. But neither should they obscure the genuine integrity of purpose and moral coherence which underpin today's historic event. (March 1, 1998 p 30).

Was it a clique of wealthy and reactionary, and *American* interests fighting a loss of power over the imaginaries (and their consequences) in the countryside, or a richly diverse range of *Britons*?

Another report claimed that

> "There was little evidence of the Home Counties posing kit of green wellies and shiny new Barbours which townies affect north of Potter's Bar. The very occasional black labrador looked as though it worked for its living. (Hamilton, The Times March 2, 1998 p. 1)

Whilst another reported,

> "It took five hours for all of the marchers to set off. Most were genteely dressed, in Barbour jackets or green tweeds, and many carried pro-hunting banners.
> Julia Long, an animal rights activist who turned up to picket the event complained that the march had been 'taken over' by the pro-hunting lobby. 'I don't know if there are any genuinely hard-up people there at all. They all look pretty prosperous to me.
> (Harding, The Guardian March 2, 1998 p 4)-

Did the reporters see what they wanted to see? Presumably they were covering the same event. And surely it is not simply the differing political orientation of the newspapers which led them to tell such different stories. Whilst it is possible that they were are different parts of the march and generalised from different samples of the total population of marchers, that level of inaccuracy is not typical of British broadsheet journalism. It certainly does seem that differing imaginaries of the countryside, of who has a legitimate voice in the countryside and of who this protest represents are present in these two accounts which purport to tell the same story.

Another way in which the protest was framed was to link it with a long British history of democratic revolt and nationalistic protest sited in the countryside. Thus the protesters were able to assume the mantle of defenders of democracy, referring to historical uprisings from the countryside. Yet the reports on this democratic principle were equally contradictory.

> The Countryside Alliance does not speak for the majority of people in the countryside. In fact a recent MORI poll showed that 57 per cent of people living in rural areas support the Foster Bill. (Wendy Leavesley. The Independent. n.d)

The Guardian reported,

> A tweedy lady was telling her friend: 'This is meant to be a bloody democracy. But you can't do anything these days.' Next to her was one of the antis, trying to explain his case: 'This is a democratic country and most people don't want fox hunting.' (Matthew Engel The Guardian March 2, 1998 p 1)

Indeed, some marchers claimed that country people were subject to a dictatorship of a democratic majority and cast themselves and their issues as a minority, discriminated against by an urban majority.

> Lady Mallalieu, a keen huntswoman said that the rally was about 'the freedom of people to choose how they live their own lives. It is about tolerance of minorities and, sadly those who live in the countryside are now a minority. It is about listening to and respecting the views of other people of which you may personally disapprove.
> Frederick Forsyth directed his brief speech to Tony Blair....'You can run this country the way you promised or you can run it as an elective dictatorship. We are waiting for your answer. (Charles Clover, The Daily Telegraph July 11, 1998 p 4).

The same speaker went on to defend the pro-hunting lobby saying,

> Hunting is our music, it is our poetry, it is our art, it is our pleasure. It is where many of our best friendships are made, it is our community. It is our whole way of life....Lady Mallalieu ended her highly charged speech with the words Shakespeare gave to Henry V, addressing another minority 'We few, we happy few, we band of brothers on the eve of another battle, Agincourt (Charles Clover, The Daily Telegraph July 11, 1998 p 4).

On the one hand, the protesters were seen as defenders of democracy, on the other, the interests of the countryside were reported to be the interests of a small elite of wealthy landowners and landed gentry. They have always been a minority, but their power has been disproportionate to their size. Indeed, while a great emphasis was put by the organisers upon a peaceful and civilised demonstration, some reports cast the rural protesters in a different light:

> Stephen Rothwell, a barrister who moved with his wife Sarah to the area [Peak District] 15 years ago, could be on a different march. He wants Piccadilly to echo to the cry 'Listen to us'. He predicts civil disobedience if the government does not. 'If they proceed with this (ban on hunting) I think there are at least 10,000 or 20,000 people who are prepared to go to prison sighting against it,' he says. He speculates that blocking motorways with horseboxes might be a tactic in the next stage of the rural rising.
> (Steve Boggan, The Independent on Sunday. March 1, 1998 p3).

Much less gracefully, the rural working people were portrayed by one commentator as hardly passive or respectful,

> They intend that this great rural rebellion should be orderly and non-violent. Yet rumbling through their ranks will be a powerful conviction

> that they are victims of a class war that has turned the countryside into a battle zone in which remnants of a proletarian `us' rage against remnants of a privileged `them': animal rightists v field sports, ramblers v landowners, the green uplands v council estates.
>
> The loudest cheers were for veiled threats rather than calls for conciliation.
> `This is the last *peaceful* march and this is the last *peaceful* rally,' boomed David Jones, a professional huntsman, to wild applause and a few nervous looks from the organisers.

And,

> I'm pigsick of weirds with beards of both sexes assaulting me,' cried the Daily Telegraph's country writer, R W F Poole, to some of the loudest cheers. `From now on, I will return blows and abuse with compound interest. Stop letting these townie buggers grind us down! (Robert Hardman The Daily Telegraph July 11, 1997 p 1)

Again, we have conflicting portrayals of rural people. The rural elite are on one hand, civilised and effete, on the other, dangerous and violent. The rural working class are characterised on one hand as "forelock tugging yokels" (Germaine Greer, The Observer March 1 1998 p 25), and on the other, they are dangerous, violent and capable of uncontrollable viciousness.

Conclusion

Evidence indicates that both the Countryside Rally and the Countryside March were organised in opposition to the anti-hunting stance of the New Labour government. And yet, given the numbers estimated to participate in the hunts in Britain both economically and as hunters (60,000-160,000 -- The Guardian, July 11, 1997), it is clear that the participants in the March were composed of more than the hunting communities alone. This indicates that the organisers were successful in framing their protest as a rural verses urban issue, enrolling a larger and more general level of rural dissatisfaction amongst rural residents who may not have supported hunting and capitalising on a larger dissatisfaction over an urbanising countryside.

This became, therefore, a conflict between geographical imaginaries about the English countryside. Rather than simply a pro- and anti-hunt demonstration, the Countryside March became a vehicle for the expression of conflict over definitions of what the countryside is, of who is rural and who is not, of what is acceptable activity in the countryside and what is not. In other words, it was a conflict between two specific geographic imaginaries -- one which sees the countryside as a space of production, and one which sees it as a space of consumption.

Hunting with hounds is a specifically British phenomenon, yet the strategy of allying a single issue with those of a larger community is one which could be employed a number of specific campaigns in a number of national communities.

This conflict lies at the heart of a problem facing rural policy-makers in an urbanising countryside. Although researchers and commentators have identified that the dichotomy of rural and urban is both inaccurate and unhelpful, this division remains extremely cogent in the imaginations of the general public, whether that public is located in the countryside or in the cities. To quote Howard Newby, "As we know, in this country especially, "rural society" and "urban society" are becoming increasingly interpenetrated and there is not a great deal one can do to distinguish between them in many areas" (Newby 1990). Nevertheless, the Place Myth of the rural idyll has come to dominate urban perceptions of the countryside to such an extent that people believe the countryside is clean, healthy, beautiful and unchanging, regardless of evidence to the contrary. Likewise, rural productive communities are holding fast to the vision of a countryside in which land-ownership and exploitation remain the primary qualities of rural spaces. This can only lead to further conflict as these imaginaries begin to have material consequences in the built environment of the countrysides.

Rural policy-makers must understand this phenomenon if unintended negative consequences of rural policies are to be minimised. Rural working populations cannot be expected to make an instant and easy transition from productive labour to service-sector employment when their beliefs and aspirations for their homes are caught in geographic imaginaries which prioritise production over consumption.

Increasing urbanisation through in-migration of urban populations and the increasing hegemony of urban elites in national policy-making has combined with a declining willingness to subsidise rural production (and concomitant decline in typically rural employment) to erode the potency of an imaginary of a productive countryside where the farmer or forester is predominant. Rural working populations are therefore increasingly under threat and, due to the strength of their specific geographic imaginaries, may not be able to respond to changing rural conditions in ways that urban-centred policy-makers might expect.

Thus there are very real and material consequences to such abstract phenomena as geographic imaginaries and any attempts to produce rural policy must address not only the material conditions in the countryside, but also the ideational universe which lie behind them.

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A Case For The Participation Of Women To Sustain The Future Of The Rural Economic Community: An Ongoing Perspective Indicating Future Policy Implications

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Abstract

The role of agriculture in providing employment and income in rural areas has declined. At the same time, there is growing recognition of the importance of the role of women in rural development. As a result policy planners are having to change the way they encourage and implement economic development in the countryside in order to sustain the local economic base, ergo the rural community, without further damaging existing social, economic and cultural structures. This paper looks at the cyclical pattern of women's involvement in the rural economy over the last century and considers why it is only in the last decades of the 20th century that the importance of their economic contribution has been recognised as a policy priority. This is particularly relevant in the light of findings indicating the kind of sustainable and holistic approach that women appear to have. Economic considerations, far from being the only priority, are only part of a much wider social and community perspective to enterprise start-up and development. As such, they must lead the way forward into the new millenium for rural development.

The process of job and revenue creation is central to economic development in the West. However, figures show that large corporations, whilst contributing significantly, cannot be depended on to drive the economy in what Mistick (1999) refers to as 'the age of deindustrialisation', or post-industrialisation. Statistics for Micro, Small and Medium Enterprises, coupled with those indicating the growing number of women in self employment, should alert policy planners, particularly in rural areas, to the growing importance of the economic contribution that women make to sustaining the local economy.

At present over 50% of the working population in the UK is female. From 1981 to 1990, there was a 56% increase in self employment. Within that, female self employment grew by 76% from 1981 - 1992 (Labour Market Skills and Trends 1994/5). It is gradually being recognised that many newly self-employed people, establish micro-businesses (Clarke, 1995). The economic contribution of Small and Medium Enterprises (SME's) is well documented both in terms of financial turnover and provision of employment - 66% of financial turnover within the European Union (EU), over 60% in the UK. In the UK, in 1997, micro-businesses represented 95% of all firms, accounting for 30% of all employment and 23% of financial turnover (DTI, 1998).

In a 'rural' county such as Shropshire, the combined economic contribution from both SMEs and Micro-businesses is higher. Shropshire Chamber Economic Assessment 1994/5 reported that SME's (including Micro-businesses) dominated the economy, accounting for more than 75% of all employees and 99% of all establishments. Within Shropshire, the Labour Force Survey showed that the largest rise in economic activity rates were that of Female employment, increasing from 55% to 59%. However, it should be noted that this has coincided with the significant increase in part time work (Shropshire Chamber of Commerce, 1996).

Raynor (1999), in his survey looking at the economic contribution of women in agriculture, notes that up to 33% of farmers' wives contribute vital additions to the household income through 'non farm but on farm' micro-enterprises or diversification. His findings also substantiated the long held anecdotal belief that most on-farm diversification's are initiated by family members other than by the farmer and often this was the female partner.

Women's' role in UK agriculture

Female entrepreneurs are not a new phenomenon, and in her paper, Mary Moore paints a fascinating picture of the role of farmers' wives in British Agriculture in the 20th century (Moore, 1996), summarised here. It appears that women have always played an important role in the farm economy although it varies and seems to depend on the particular economic circumstances of the time. She "adds value" where it is most needed by the farmer and this depends, unsurprisingly, on farming's fortunes. Hence, there seems to be a cyclical pattern where her role is more peripheral when agriculture is going through a boom and more central during a slump. So, in the early decades of the century, a relatively prosperous period, she takes raw materials (e.g. milk) and supplements the farm income by producing consumer foods (milk and cheese) for sale at the local market. As the general economic depression of the 1920's affected even a staple industry such as agriculture her role becomes even more important. The formation of the marketing boards in the 1930's provided a guaranteed market and price for milk and she found new ways to make money and typically started to take in paying guests. With the mass call-up of men to fight in the Second World War women took on a further vital role as Land Girls, this time directly involved in production agriculture. Many of these Land Girls married farmers and stayed on after the war. With more formally educated women on the farm they started to contribute as farm secretaries and, often, full business partners. Business help was important in the 1950's and 1960's with the development of agricultural policy, and the subsequent growth of subsidies, designed to encourage increased output. Farming became more complex. This continued into the 1970's and early

1980's as the UK joined the European Union and agriculture benefited from the protection and high prices offered under the Common Agricultural Policy. Farming fortunes began to wane again as the costs of the CAP became unsustainable and piecemeal reform in the 1980's began to have an impact on farm incomes. When external pressure from world agricultural producers, through the auspices of the GATT, led to more structured reforms farm prices and incomes fell further. Once again the farmers' wives (and often daughters) needed to supplement the farm income and many returned to taking in paying guests, in the form of farm holidays and Bed & Breakfast. They also diversified into other non-farm enterprises, notably farm shops, but stringent food hygiene regulations made a return to food processing, such as cheese and butter, more difficult. With the latest round of the WTO talks, the days of commodity production in British agriculture are numbered. Farmers face further pressure on income in the 1990's. Hence, agriculture will become an even less important employer in rural areas than before, whether providing jobs directly or within the ancillary sectors.

Finding employment in the modern rural economy

Employment in agriculture continues to decline (Hodge, op cit) and is no longer the major influence on the rural economy, although the economic impact of its decline still has important consequences locally. The significant growth in the service sector in rural areas, especially tourism, means that it now dominates the employment market. Unemployment rates in rural areas tend to be lower overall than the national average but that is often accompanied by low wage levels and a high incidence of seasonal work. This has been a perennial problem even though the main source of rural jobs has changed significantly. The problem for female employment however is more acute. Statistics on the rural workforce are notoriously difficult to interpret. However, one thing is clear, the importance to farm households of income from non-farm sources (Wheelock, Baines, Ljunggren, Magnussen, Pettersen and Oughton, 1999). As well as farm diversification, there has been a growth in the non-farm rural sector, much of it in small and micro-businesses, and it is the continued success of these businesses with which this paper is concerned.

According to Hodge (1999), the relatively strong performance of rural businesses is often based on factors such as low costs and quality of the residential environment which attracts a relatively high proportion of entrepreneurs. Hodge also notes that rural firms have shown themselves able to target new and emerging markets; adopt more frequent product developments and service innovations; exploit competitive advantages from greater labour force stability, quality and motivation, good management-labour relations, and lower costs. He goes on to say that successful rural firms have taken advantage of particular opportunities for growth. Remoter rural areas have tended to develop products linked to rising consumer incomes, especially leisure based activities and products. Improved communications and transport networks mean that in more accessible rural areas the emphasis is on more sophisticated business needs: consultancies, computer software etc. It should be pointed out here that not all rural areas have these advantages as many are still relatively inaccessible. The overall picture, however, highlights a reaction to a post industrialised economy, and a clear move towards service sector provision, which is, traditionally, the remit of the female worker (Mistick 1999).

On-farm-but-non-farm

Given the existing difficulty of securing employment in rural areas along with the macroeconomic changes that have taken place, (causing the change in emphasis from the countryside becoming a place of 'consumption' rather than one of [primary] production), coupled with dramatic reductions in farm incomes, the stage is set once again for the Female Rural Entrepreneur to create new job opportunities and provide additional sources of on-farm but non-farm income for rural families. To illustrate the way this process is evolving we consider the following two case studies.

Case study A Mrs S ran a small livery business on the family dairy farm, largely to subsidise her own hobby as an amateur event rider. When a serious illness meant that her husband could no longer work, an alternative source of income was required to support the family, including her young son. In the short term, she took on work delivering parcels for a national catalogue company (in which capacity she now employs her husband) and sold natural herbal products over the phone. In the longer term, an alternative use had to be found for the farm to generate more income. Mrs S was not from a farming background but had learned enough to ensure that at least some of the necessary income could continue to come from farming. After selling the cows and leasing out the milk quota, she now farms all but 38 acres of the 198 acre farm in an informal partnership with a neighbouring farmer and some of the buildings are used to house cattle being prepared for shows and sales. Given that Mrs S had already obtained British Horse Society qualifications in riding and stable management, it was an obvious move to build up the livery business. Hence, the rest of the buildings were progressively turned into stables and 38 acres subdivided in small (2 – 3 acre) paddocks. The livery yard is now full and customer loyalty has been gained in no small measure by the facilities that are continually upgraded, and now include a well drained, floodlit menage, a hot and cold shower for the horses and toilet and tea-room for the livery owners. She also provides home produced hay and haylage. Mrs S, who used to drive a lorry for a living, also now runs a successful horse transportation business alongside the livery yard. Her entrepreneurship has brought business to the pub across the road, local saddlers, farriers and other small businesses as well as securing the future of a family farm. She is currently looking at new ways of diversifying.

Case Study B Mrs H along with Mrs D, run a mail order business supplying high quality dog beds, fashioned from hardwood, that blend in with the interior decoration of any room for which the product is ordered. Mrs H had been looking to set up a business, as a result of the 'farm crisis', to supplement the rapidly falling income on the dairy farm run by her husband. ("We milk, extremely efficiently, 250 cows and generate zero income from it"). The two partners were also looking for a business venture that would fit in with bringing up young families (each having 3 children under the age of 9). In this instance the venture was purely entrepreneurial, as the idea was generated from spotting a niche-market as a result of Mrs D's partners work. The business is in its early stages, but indications are that it is growing steadily and that most of the orders are coming from urban areas, particularly London. Local materials and local skills are used (local craftsmen produce the boxes and a local girl is employed to produce the cushions), thus creating much needed rural employment. Both partners currently feel strongly that things should remain locally. Alongside this business, Mrs H has two other enterprises with which she is involved. One is in 'Network Marketing' telesales, which also employs her husband, and the other is opening a saddlery/tack shop business. Mrs H's background education has not been in agriculture, but in marketing and tourism which has been put to good use in order to not only provide sustainable income for a rapidly falling family farm income, but for others of the local rural population too.

Despite currently impressive statistics, and the wealth of historical sacrifice made by rural women to sustain their families, there still remains no cohesive development policy for rural areas, let alone for female entrepreneurs in rural areas, either in the UK, or within the EU as a whole. (see Shortall, Braithwaite, Bryne and Owens to name but a few). Any policies that do exist are sporadic 'one-off' measures and invariably uncoordinated within any wider cohesive rural development policy. History shows us that, in the last century there had been a continual involvement and contribution to the economic process from women, which, it could be argued, has regularly been subjugated for the sake of political expediency.

Looking at the case studies shows that the increase in levels of education of the female entrepreneur has made a profound difference to the equation of *agricultural slump = female contribution* while *agricultural boom = sidelined female/unpaid help*, and it is becoming clear that with de-industrialization, the equation this time should balance in favour of the female entrepreneur, as gaps in education and training that previously precluded them from independent entrepreneurship are starting to be filled.

Initial findings of the EU funded Marches Farm Enterprise Programme in the English Marches confirms this trend towards the shift in the balance of economic power on farms as the women come forward with innovative ways of survival, providing much needed employment and stability in rural areas. Research, and indeed the two case studies themselves show, that female entrepreneurs operate their enterprises around the social and cultural commitments that they have (see Wheelock et al, op cit), and are better placed to consult effectively on the kinds of sustainable development necessary to enable rural communities to survive, both economically and socially. What is still missing, however, is the apparent lack of desire to put the necessary policy changes in place that would ensure that the vital contribution that these female entrepreneurs make, is not wasted. It appears that in the UK we are still generating policies that are focussed towards male orientated primary production solutions (Whittaker et al 1999). There appears to be little or no regard for the contribution that is made from female entrepreneurs. A growing amount of research has shown that policies targeted towards female entrepreneurs would better facilitate growth within the female led enterprises that already exist. The macro-economic changes, coupled with the way that female entrepreneurs operate within the community, must indicate that any policy development made without consultation with a group with a fast growing economic base, the female entrepreneur, is both discriminatory and wasteful.

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Rural Parents' And Students' Satisfaction With Public Schools In Queensland

John King and Trevor Bond, Australia

Abstract

In 1997-8, some 1,300 government schools in an Australian state were surveyed as part of a contracted School Opinion Survey Project to measure the satisfaction of parents and students with Australian state government schools. Some 38,000 parents with children in years one to twelve, and 43,000 students from years 7, 9 and 11 responded to the survey. Responses were analyzed using Rasch analysis, which enabled state satisfaction benchmarks to be constructed for parents and students. Satisfaction benchmarks for schools of a similar type (primary, secondary, special, etc.) were also constructed. Individual schools received reports that compared their parent and student item estimates of satisfaction to the state and like-school benchmarks. This paper will report on satisfaction estimates of parents and students in remote/isolated areas who participated in the survey, and will compare them to those for the state as a whole. Parents and students in remote/isolated areas mirrored the major findings of the survey for all parents and students in that parents exhibited higher satisfaction profiles than students; and the lowest item estimates of satisfaction were found for questions relating to the use of technology and behaviour. Interestingly, parents and students from schools of distance education, with student populations residing mainly in isolated/remote areas, reported one of the highest satisfaction profiles in comparison to other school types.

This paper outlines some outcomes of a school opinion survey carried out over 1300 government schools in one Australian state. Aspects that relate to rurality, defined here in terms of remoteness and isolation, are the focus of the paper.

The survey was carried out by means of author-designed parent and student survey forms that were developed in consultation with a state response group and target group consultants. The framework used to guide questionnaire construction was Moos's scheme for classifying human environments (Moos, 1979) and the survey items were cross-referenced with the goals of the state education authority. Forms were trialed before use in the main survey. Reduction of the trial question sets of 35 questions to the final sets of 20 questions used was informed by a combination of:

- the use of an 'importance' response column (which was not included in the final survey form) to glean information from the respondents as to which trial questions they deemed to be important;
- the use of a 'don't know' response column in order to determine the level of understanding of the respondents to the trial questions;
- Rasch analysis of the trial question parent and student responses that highlighted questions exhibiting a good fit to the Rasch model; and
- feedback from state response group meetings.

A sample of parents was obtained across all grades in each school except for small schools (n<30) where all parents were surveyed. Students were sampled from years 7, 9 and 11 at each school site where these years were present. For small schools, a similar allowance was made by surveying all students in the grade involved.

State wide and individual school analyses were carried out by the authors using Rasch analysis (Adams & Khoo, 1993; Adams, Wu & Wilson, 1997) in order to obtain satisfaction estimates and item difficulty estimates for state wide and school samples. Rasch analysis was adopted by the authors as the most appropriate technique for use in the development, validation and analysis of school satisfaction data for a number of reasons including:

- it identified the extent to which items measured a single underlying satisfaction construct;
- it provided measures that are sample and item independent;
- it modelled error estimates that were sensitive to varying sample size; and
- it yielded fit statistics which monitored adherence to the model and assisted in interpreting the meaningfulness of findings.

Further analyses were performed for identified target groups, geographically based districts, school type and size, as well as for other variables of interest. In the following sections, analyses providing estimates of client satisfaction that related to rurality, defined in terms of remoteness and isolation, are discussed.

Location

Of all the school demographics collected, teacher transfer points were considered by the authors to be the best indicator of remoteness/isolation. The teacher transfer points allocated to service at any school per year of service at that school are allocated by the state education authority to each school on the basis of its perceived remoteness/isolation as measured by services and facilities available at that location. Transfer points are based on a scale of one to seven where the seven level equates to the most remote/isolated schools. After accumulating a predetermined number of transfer points, teachers become eligible for transfer to a less remote/isolated area.

For both parents and students, the differences between satisfaction levels according to this remoteness criterion were small but measurable.

Parent satisfaction by location

Table 1 indicates that parents of schools at the 6 and 7 transfer-points level expressed the least satisfaction. Highest satisfaction was reported for parents at the three transfer-points level.

[b] A logarithmic scale unit representing a linear, interval measurement such that any difference in item difficulty or client satisfaction maintains its value anywhere along the scale. The analysis indicates that parents whose children attend the most remote/isolated schools report the least satisfaction with their schools.

Student satisfaction by location

For students, students of schools at the 1 transfer-point level (i.e., city-based schools) expressed least satisfaction, which is quite the opposite response to that of parents. The highest student satisfaction level is reported at schools with level 5 teacher transfer points. Satisfaction estimates for students by location (based on teacher transfer points) are located in table 2.

[a] The average estimate for all students was set at 0.00 logits. Higher values indicate more client satisfaction.

It might be inferred that students at remote/isolated schools perceive the school environment as a place that provides them with social contact with peers that would be otherwise lacking if they had to undertake their education via the alternative option - through a school of Distance Education. On the other hand, parents of students attending non-remote metropolitan schools might be more satisfied because of the level of educational opportunity these schools offer in terms of curriculum choice, or simply because they have a choice of schools available to them. Parents who are not satisfied with one school, can choose to send their children to another, and presumably be more satisfied with the choice. By contrast, students appear relatively less satisfied with these metropolitan schools, perhaps because of their sheer size and less personal atmosphere.

School Size

Satisfaction levels for parents and students were also analysed according to the classification band of the school that the children attended. The classification band is a state education authority measure of the complexity of the school in terms of its management difficulty. It is linked to the classification of the Principal. A crucial aspect of school complexity is size of enrolment, but other factors such as the number of students with special needs in the school and the cultural diversity of the school clients are taken into account when determining the classification band. Hence some small schools such as special schools and schools with a high indigenous population have a classification band greater than what the student population might otherwise suggest. Generally though, the higher the classification band, the larger the school.

For the purpose of this paper, classification band was used as the indicator of school size, where band 4 represents the smallest schools (enrolment *c.* 3-25 students) and band 11 schools (enrolment c. 1500-2000 students) the largest. While school size is less accurate an indicator of remoteness/isolation than is teacher transfer points, most small band 4 and 5 schools in Queensland lie in rural areas with a greater or lesser degree of remoteness and/or isolation.

Parent satisfaction by school size

Table 3 indicates that there is a large range (1.35 logits) between the most satisfied (band 4) and least satisfied (band 11) parents in this sample; indeed the smallest schools (band 4) parents report a greater than 0.5 logits satisfaction difference over the next most satisfied group (band 5). From these data it would appear that decrease in parent satisfaction occurs as the size (and complexity) of the school increases and that the most satisfied parents are generally found in small rural schools

While this result for parents appears to be in direct conflict with that found previously for teacher transfer points, it needs to be emphasised that classification band does not measure remoteness/isolation to the same degree as teacher transfer points. Many band 4 and 5 schools are located at relatively short distances to reasonably sized regional towns. While these schools might be accurately described as rural, they would not usually be described as remote or isolated - at least not by Queensland standards.

Student satisfaction by school size

Table 4 indicates that student satisfaction levels, measured against classification band, also increase as school size/complexity decreases. There is a large overall range of 1.18 logits between the most satisfied group of students (band 4) and the least satisfied (band 11).

The satisfaction levels of students, like parents, are higher in the less complex and smaller rural schools with varying degrees of remoteness/isolation. School size/complexity, as measured by classification band, displays a negative relationship with school satisfaction levels; the greater the classification band, the lower the mean client satisfaction with the school.

School Type

Satisfaction levels for parents and students were analysed according to the type of school that the students attended. In the context of this paper, the school types of interest are schools of distance education (sometimes referred to as schools of the air in Australia) and community schools (whose clients are primarily indigenous Australian). While schools of distance education are physically located in metropolitan or large regional towns, their clients are located largely in remote/isolated areas. The community schools, as well as their clients, are in the main located in remote/isolated areas. Hence the effect of remoteness/isolation on the school satisfaction levels of these two client groups can provide an interesting comparison to the satisfaction levels of clients from other school types.

Parents by school type

Table 5 indicates that the extreme satisfaction levels by school type are attributed to parents of children attending Special schools (highest) and parents of children at Community schools (lowest). Because Community schools are few in number, the sample size of parents is low in comparison to other types of schools. In the case of parents, relative satisfaction levels of those involved with schools of Distance Education are closer to the mean than they are for students (Table 6).

Students by school type

Table 6 indicates that students from schools of Distance Education reported higher satisfaction levels than parents, while the extreme positions were allocated to students from Special schools (above) and those from Community schools (below). The range of relative satisfaction levels according to school type varies considerably (*c.* 2.5 logits). Satisfaction estimates for students according to Type of School attended are located in table 6.

The above results indicate that the remoteness/isolation of the above two client groups, namely distance education clients and community school clients, does not give rise to similar satisfaction with the educational services they are receiving. For distance education clients, the satisfaction levels are relatively high, whereas for Community school clients, satisfaction levels are markedly low.

Educational District

Satisfaction estimates were also calculated by educational district within the state. Districts in Queensland vary greatly in remoteness /isolation. Some eight districts are located in the capital city of the state. The two most remote/isolated districts are located more than 2 000 kilometres from the state capital.

Of the 36 districts, parent satisfaction levels for the most remote/isolated districts were generally lower than the mean level, with only marginal but measurable differences between adjacent levels. This result corroborates that found for teacher transfer points which also indicated low satisfaction levels for parents located in remote/isolated areas.

For students however, the top three districts in terms of satisfaction level included the two most remote districts and another district that could be described as remote. This result also supports that found for teacher transfer points.

The conflicting perceptions of parents and students in remote/isolated areas suggest that parents apply different criteria than do students when expressing their satisfaction with the school.

Discussion

This paper has focussed on client satisfaction with school as it relates to rurality, defined in terms of remoteness/isolation. A number of measures including teacher transfer points, classification band, school type and educational district have been used to uncover links between rurality and client satisfaction with school. While these school demographics can be used to measure remoteness/isolation with varying degrees of accuracy, it is argued that teacher transfer points provides the best indicator, given they have been designed by the state education authority for that purpose.

While there is a common perception that remoteness/isolation equates with lower quality of educational services, the analysis of school satisfaction of those clients who access educational services in remote and/or isolated areas of this Australian state does not suggest that this perception is necessarily strongly held by them.

It is apparent that some differences in satisfaction levels, such as those at Community schools compared to other school types, are related to differences in the cultural background of the clients. Differences in these cases might relate more to important cultural issues rather than to remoteness/isolation per se.

Other differences in satisfaction levels of remote/isolated clients, such as those between parents and their students, may relate to the more intimate knowledge that students have of their school and to a greater sense of belonging compared to their parents. The differences might also relate to the differing expectations parents have of schools compared to their offspring.

Parents of students attending remote/isolated schools have less choice of school compared to their metropolitan counterparts, which could explain their observed lower satisfaction levels. The experience of the authors suggests that rural parents are generally more aware, more critical and more demanding of their local school and generally have more direct contact with it. Hence they may have seen the survey as a more relevant opportunity to have a say about their school compared to their city cousins.

The conflicting results obtained for parents suggest a tension between remoteness/isolation and school size/complexity. On the one hand, the more remote/isolated the school the more disadvantaged parents may perceive themselves. On the other hand, the smaller and less complex the school, the happier they feel. Students do not appear to share this conflict. With the exception of Community school students, students in remote/isolated areas appear to be among those who are most satisfied with their schools.

In conclusion, it seems reasonable to suggest that it is the group of parents, rather than the group of students for whom the concepts and consequences of remoteness and isolation are more pervasive.

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Disclaimer Permission to use the survey data was given by Education Queensland. The views expressed in this paper are not necessarily those of Education Queensland.

Table 1
Satisfaction Levels for Parents by Location (Teacher Transfer Points)

Teacher transfer points group	Estimate[a] (logits)[b]	Error	N
1	0.360	0.002	18 274
2	0.381	0.003	9 990
3	0.498	0.005	4 131
4	0.313	0.008	1 726
5	0.402	0.010	961
6	0.195	0.016	346
7	-0.240	0.018	566

[a]The average estimate for all parents was set at 0.00 logits. Higher values indicate more client satisfaction.

Table 2
Satisfaction Levels for Students by Location (Teacher Transfer Points)

Teacher transfer points group	Estimate[a] (logits)	Error	N
1	-0.004	0.002	22 340
2	0.031	0.002	11 321
3	0.082	0.004	3 638
4	0.056	0.006	1 620
5	0.127	0.009	803
6	0.099	0.016	192
7	0.093	0.019	409

Table 3
Satisfaction Levels for Parents according to Classification Band

Classification band	Estimate[a] (logits)	Error	N
Band 4	0.863	0.003	761
Band 5	0.346	0.003	3776
Band 6	0.078	0.003	3162
Band 7	-0.037	0.003	3655
Band 8	-0.065	0.003	7573
Band 9	-0.245	0.003	8176
Band 10	-0.452	0.003	6158
Band 11	-0.488	0.003	2653

[a]The average estimate for all parents was set at 0.00 logits.

Table 4

Satisfaction Levels for Students according to Classification Band

Classification band	Estimate[a] (logits)	Error	N
Band 4	0.727	0.003	269
Band 5	0.365	0.003	991
Band 6	0.034	0.003	1 449
Band 7	0.000	0.002	3 327
Band 8	-0.023	0.002	7 142
Band 9	-0.277	0.003	8 936
Band 10	-0.377	0.002	11 758
Band 11	-0.450	0.002	6 451

[a] The average estimate for all Students was set at 0.00 logits.

Table 5

Satisfaction Levels for Parents according to Type of School attended

Type of school	Estimate[a] (logits)	Error	N
Special schools	+1.153	0.012	876
State schools	+0.516	0.002	26 297
Distance education	+0.313	0.011	237
Infants schools	-0.036	0.012	110
High schools	-0.161	0.003	8 332
Community schools	-1.785	0.012	52

[a] The average estimate for all parents was set at 0.00 logits.

Table 6

Satisfaction Levels for Students according to Type of School attended

Type of school	Estimate[a] (logits)	Error	N
Special schools	+1.035	0.013	372
Distance education	+0.467	0.013	202
State schools	+0.228	0.002	19 133
High schools	-0.286	0.002	20 577
Community schools	-1.444	0.016	39

[a] The average estimate for all students was set at 0.00 logits.

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The Issues Shared By Professionals Living And Working In Rural Communities In British Columbia

James C. Montgomery, Canada

Abstract

This presentation is a summary of a study looking at the issues faced by teachers, nurses, social workers, and police officers in eight rurally different communities in British Columbia. A triangulation study, it features a review of the literature to identify issues shared across the disciplines, a Delphi probe to verify the issues, the creation of a rurality index in the selection of research sites, and an analysis of interviews revealing a lack of agreement between the experts' views of the issues and that of the practitioners living and working in rural communities. This dissonance results in an identification of two views of rurality; a rural-as-deficient approach that dominates the literature and an approach that sees rurality as something that is different. Findings include the identification of 20 issues shared by rural professionals in British Columbia and a list of 18 inferences about the relationships between the issues and the professionals, between the professionals and their communities, and between the rurality of the communities and the issues; with implications for rural policy makers, pre-service teacher-educators, and potential rural teachers.

This is a triangulation study (Jick, 1979) collecting different kinds of data to examine community, workplace, and social issues faced by professional people living and working in rural communities. This study had its roots in my experiences as a teacher and principal of a K-12 school in a rural community in northern Canada. As a professional person interacting on a regular basis with such other rural professionals as social workers, doctors, nurses, teachers, civil servants, and Royal Canadian Mounted Police (RCMP) members; it seemed that we shared fundamental concerns with respect to living and working in a small and isolated community. This research is an investigation into those concerns and into the relationships surrounding them.

The fundamental purpose of this research, ***to investigate and make sense of the issues experienced by professionals living and working in rural communities in British Columbia***, was developed into four researchable questions and sub-questions asking about: (a) the issues, (b) the relationships between the issues and the rural professionals, (c) the relationships between the rural professionals and the rurality of their communities, and (d) the relationships between rurality and the issues.

The Literature

I conducted a review of the literature relevant to the three principal foci of this study: rural issues, rural professionals, and rural communities. An investigation into rural communities with a view to comparing different aspects of them readily revealed the necessity to define rurality in a measurable sense. The Griffith Service Access Frame (Griffith, 1997), an Australian quantification model, offered the ability to calculate the rurality of a community. It featured an algorithm that combined isolation, community size, and access to services in a transparent and objective manner. This model was additionally attractive with the literature revealing (Storey, 1992) that rural teachers in British Columbia generally felt that the main components of rurality were community size, isolation, and access to services.

A search in the literature for what is currently known about such rural professionals as teachers, nurses, social workers, and police officers identified six themes: age, gender, background, training, why they move into a rural community, and why they stay or leave that community. There was a suggestion (Montgomery, 1999) that rural professionals: (a) are younger than their urban counterparts, (b) suffer from a gender bias in the workplace, (c) have a rural background, (d) are not rurally trained, (e) move to a rural community for work, and (f) leave rural communities because of work-related issues.

An exploration into what is currently known about rural issues in the fields of education, health, human services, and law enforcement revealed a set of issues faced by those professionals. These issues were grouped into the three broad categories of: (a) community and culturally related issues, (b) professional and work-related issues, and (c) personal and social issues.

A Theoretical Framework

An adaptation (Figure 1) of a three dimensional rurality model used by Helge (1984) enabled this study to examine the issues relevant to rural professionals in rurally different communities. One dimension, the rurality of a community, is based on work done by Griffith (1997) in creating an index of rurality. A second dimension, the nature of a rural professional, is based on work done by Ankrah-Dove (1982) in describing the various factors affecting rural teachers' attitudes towards living and working in rural communities. The third dimension, the nature of rural issues, is derived from a literature review synthesis looking at the types of issues faced by rural professionals in each of the four disciplines.

Figure 1. The Three Dimensions Examined in the Study

Methodology

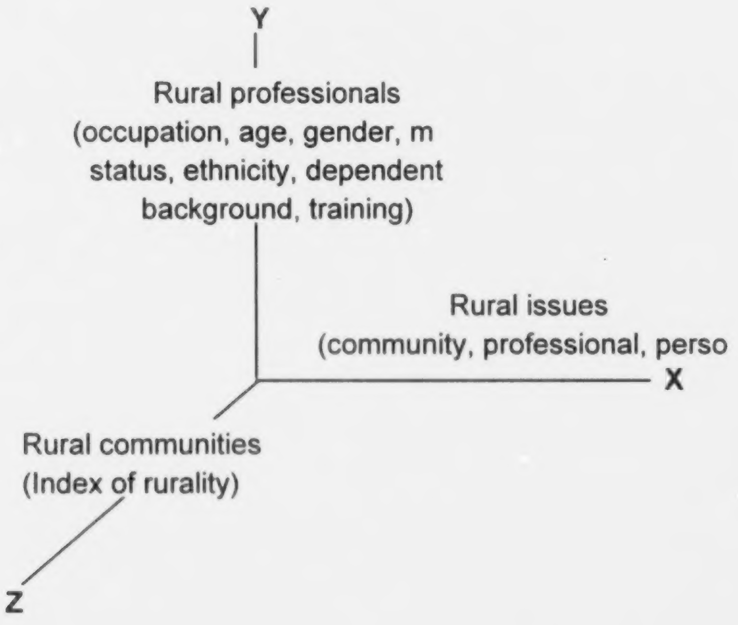
I used the theoretical framework organizationally to develop strategies to collect data (in general) about the issues within each profession, about the professionals, and about rural communities. A synthesis of the set of issues identified in a review of the literature in each discipline created a set of 50 issues shared across the professions (Montgomery & Grant, 1997). A modification of the Delphi research technique (Linstone & Turoff, 1975) applied to an international panel of experts from each of the disciplines enabled me to check for concurrence across the professions that the list of shared issues was accurate.

An application of a modification of the Griffith Service Access Frame (Griffith, 1997), created an index of rurality for rural communities in British Columbia (Montgomery, 1998). This model used a principal component analysis technique to calculate the weightings needed to combine population, distance, and economic ability statistics into one overall access to services score (rurality index) for each community. A graph of the index of rurality for the communities identified eight that were 'evenly' spread out by the index and contained a school, a hospital, a social service office, and an RCMP detachment office. I sought prospective interviewees from each of the eight communities, based on the criteria of membership in the education, health, humans services, or law enforcement professions.

Initial generalized data gathered from a review of the literature guided the development of an interview instrument designed to collect data specific to British Columbia. The interviews explored perceptions of rurality, arrival into a rural community, starting a new job, and living and working in that community for a period of time. Data from the interviews revealed a specific set of shared issues. Merging this set with the one previously identified in the literature enabled an identification of 20 issues specific to rural professionals in British Columbia. Further coding of the data by these issues, by the attributes of the interviewees, and by the levels of rurality of their communities enabled cross-referencing of these variables in a search for the relationships between them.

Results

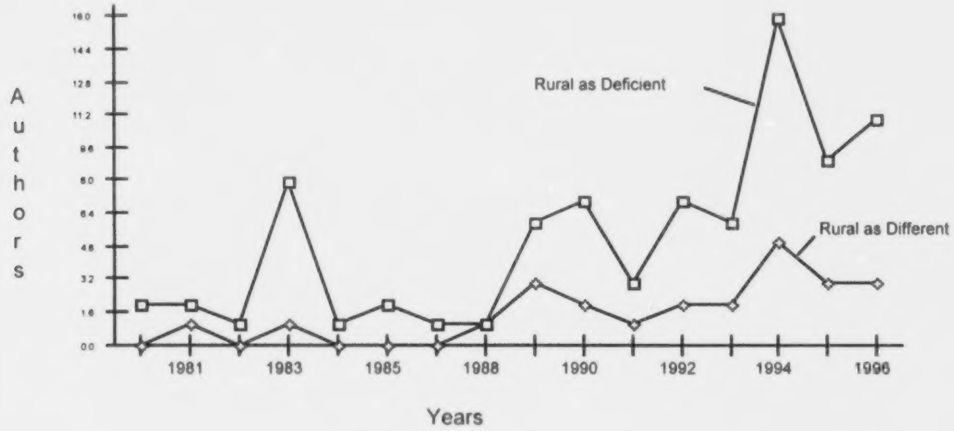
The Delphi probe with an international panel of 55 'experts' verified that the list of 50 shared issues was appropriate and represented issues faced by rural professionals. Two rounds of Likert-type responses provided this consensus. Surprisingly, when I presented the issues to practitioners as a follow-up to each interview, there was only weak agreement with the experts as to the appropriateness of the issues.



While some interviewees found responding to the issues a straight-forward task, most seemed to find the issues confusing (as judged by the blank statements and notes written to me on the survey form). Others did not complete the survey form. Comments from non-returnees shared the sentiment that many of the issues they were asked to respond to were not germane to them and there was no room to indicate satisfaction or pleasure with a topic since 'everything was slanted' towards a negative view of the issues. When queried, two non-respondents (13%) assured me that they "would get around to it", and added that the issues didn't really apply to them anyway.

The survey form, intended to provide data on the agreement of the issues between practitioners and experts, instead highlighted a lack of agreement as an area of focus. Although the resistance to completing the survey form remained puzzling, it tied in with some comments received in the first round of the Delphi probe and with my experiences in piloting the interview instrument. It seemed (in my opinion) that those professionals who were happy and comfortable with their jobs and their communities were the ones who were reluctant to complete the survey or who indicated confusion responding to some of the issues. Other interviewees, such as those in the process of leaving their communities, commented that the survey form covered every single concern of theirs. This dissonance between the experts and the practitioners compelled me to return to the literature as it was the source of the data that was the basis of my interview instrument.

A re-analysis of the literature revealed the pervasiveness of a rural-as-deficient perception compared to a rural-as-different point of view. Whereas authors writing from a deficiency or pathological view described what was wrong or was missing with rural situations; others described the positive aspects of rurality or the rural-urban differences, offering that rurality represented life-style choices. A graph (Figure 2) of these approaches by 90 authors illustrates a distinct and increasing trend to write about rurality from a deficiency perspective with an almost hidden body of literature written from an opposite position.



As the literature was my initial source of data in identifying the issues faced by rural professionals, it is clear to me how the pathological point of view of rurality had such an influence on the description of those issues, and why the practitioners in the field were so uncomfortable with an instrument derived from that point of view.

Figure 2. A Comparison of Two Perceptions of Rurality as Seen in the Literature

This 'new insight' made it possible to revisit the data from the interviews, revealing a smaller and seemingly different set of issues. This analysis enabled me to condense the original list of 50 shared issues to a manageable list of 20. The 20 issues represent those issues identified in the interviews and cross-referenced with both the Delphi survey and the partial survey of the interviewees. The issues faced by rural professionals, in this study, are:

Community and Culturally Related Issues

- closeness / linkages with the community physical
- geography (climate, scenery, nature)
- closeness to life-threatening situations (medical, motor vehicle, fatalities, suicides)
- cultural differences and attitudes
- geographic isolation
- anti-social behaviours (crime, drugs, alcohol abuse)

Professional and work-related Issues

professional positives (job satisfaction, autonomy, experiences, people, variety)

- professional frustrations (professional isolation, bureaucracy, never-ending job)
- colleagues (support, teamwork, turnover, competency)
- rural preparation and background
- inequities (work, community, family)

Personal and Social Issues

- access to family and friends
- access to services (work, community, family) recreational and social activities
- space (indoors, outdoors, & personal)
- family happiness (self, spouse, children)
- community size (anonymity, privacy, confidentiality)
- living conditions
- quality of local schools
- compensation (allowances, salaries, cost of living)

Data from over 70 hours of tape recorded interviews with 36 rural professionals over a seven month time span were transcribed and sorted into categories. Responses in these categories were collected into naturally occurring clusters (Creswell, 1998). Frequency counts enabled a measure of prominence to be placed on each cluster. Some of the stronger inferences suggested by the data in these clusters are that, in this study:

- most rural professionals are married,
- there is a gender bias in rural policing, nursing, and teaching,
- rural professionals typically grow up rurally and do not feel professionally prepared for their rural work,
- the main reason for moving to a rural community is because of work,
- the ages of rural professionals and their longevity in a community are indirectly related to the rurality of a community, and
- rural professionals in the middle levels of rurality tend to have more children than professionals at higher and lower levels.

The emergence from the data of these inferences were a verification of findings previously described in the literature within specific disciplines. Viewing these findings across the disciplines of rural education, health, human services, and law enforcement is new. The following inferences, without previous mention in the literature, appear to offer new insights into the lives of rural professionals as the data also suggest that, in this study:

- short term rural professionals are more likely to be males whereas longer term professionals are more likely to be female,
- longevity in a community is indirectly related to family size,
- longevity in a rural community is directly related to a professional's age,
- middle-aged professionals have more children than younger and older professionals,
- rural teachers, as a group, are younger than rural police officers, who are younger than rural nurses, who are younger than rural social workers,
- rural police officers and rural teachers do not, in general, tend to stay for extended periods of time in their rural communities, whereas rural nurses and rural human services workers do,
- rural teachers, as a group, have more children than other professional groups, and
- rural professionals agree on the same set of issues, regardless of profession, gender, age, ethnicity, longevity in a particular community, and number of dependents
- concerns with professional satisfaction, community size, and rural preparation are universal to all levels of rurality,

1) concerns with colleagues, family happiness, and anti-social behaviours are generally indirectly related to rurality,
2) concerns with access to family and friends, professional frustrations, access to services, recreational activities, access to space, closeness to life-threatening situations, cultural differences and attitudes, living conditions, rural-urban inequities, financial compensation, and quality of local schools are generally directly related to rurality, and
3) there is a positive correlation between concerns with rural issues generally and the rurality of rural communities (correlation coefficient 0.553).

Discussion

In addition to the identification of a set of issues shared by rural professionals in eight rurally different communities in British Columbia, and the development of a set of inferences about the relationships between the professionals and their issues, between the professionals and their rurality, and between rurality and the issues, some general conclusions to this research are possible. These conclusions include a recognition that: (a) there is a positive correlation between levels of rurality and rural issues, (b) indexing of rurality works, (c) rural professionals are a homogenous group, and (d) rurality is something that is valued in this group.

Rural issues are directly correlated to rurality. A correlation between the frequency of concerns with rural issues at each of the eight levels of rurality was compared to the eight levels of rurality. With a calculated average correlation coefficient of 0.553 as support, it is reasonable to conclude that concerns with rural issues share a positive correlation with levels of rurality.

Indexing of rurality works. The 'match' in the preceding paragraph also indicated a second conclusion, that indexing rurality makes sense in that there was such a strong resemblance to the end of this research with its beginnings. The frequency of concerns with rural issues closely matched the levels of rurality index of rurality developed to determine those concerns.

Rural professionals are a homogenous group. Every possible avenue was explored to determine if the four professions differed in their responses to the shared issues. Part of the literature review featured a comparison of researchers' views on retention issues and concluded that the professions agreed. The Delphi probe revealed strong agreement from an international cross-disciplinary panel looking at identified shared issues, and each profession in the sample indicated strong agreement on the shared issues. Although there were demographic differences involving ages, dependents, and longevity in communities, the professions shared similar sentiments in every discussion of rural preparation, recruiting, retention, and living and working in a rural community. These similarities were evident in the data reduction technique of forming naturally occurring clusters from interview data. At no point did any one profession stand apart from the others in these clusters.

Rurality is valued. My first hint at the value placed on rural living and working came from my experiences piloting the interview instrument. The seven professionals each stated at the beginning of the interview that their experiences weren't interesting, but each claimed by the end of the interview that telling their stories was fun, enjoyable, and worthwhile. Similar sentiments were voiced with the 36 interviewees. Listening to their stories was an exhilarating experience for me personally, and telling their stories was an enjoyable experience for them. Comments about keeping transcripts of their interviews, and some keeping a copy of the tape recordings were routine.

Some of the happiest people I have ever met were in the group interviewed. The first person I interviewed, a nurse, told me that she had "the best job in the world". Later, another nurse advised me that "for the right person, there is no finer job". A mountie in a very rural community felt that he should be paying the government for the privilege of doing his job, he was enjoying it so much. Typical post-interview comments invariably included references to how much fun people have in rural communities, and how much they have laughed when they look back on their rural lives.

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Canadian Rural Girls And Women: Preparing For The Millennium

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Canadian girls and women in rural communities, particularly farming communities, have experienced enormous change since the early (19th century) pioneer days of Canadian settlers (see Moodie, 1962). The late 19th and early 20th centuries saw the birth of many rural organizations, including the Women's Institutes in 1897 (Ambrose, 1996), 4-H clubs for rural youth in 1915 (Lee, 1995), Ontario Agri-Food Education Inc. (OAFE), in the early 1980s, and most recently Women in Rural Economic Development (WRED), in the mid-1990s. Over the past two centuries, girls and women have increasingly taken on leadership roles in response to rural community development concerns, and a series of farm crises which threatened the very existence of the family farm and surrounding communities.

This paper will provide a brief historical overview of the status of women in rural Canada, and then will describe the participation of girls and women in contemporary rural communities, with a focus on farming communities in Southwestern Ontario. Case studies of rural girls and women's involvement in 4-H clubs, Women's Institutes, OAFE and WRED will be included in the analysis, with a particular emphasis on the impact of WRED in the lives of rural women and their communities, as they embark on the new millennium.

Women in Rural Economic Development (WRED) provides women in rural communities with education, information, networking opportunities, and financial and other resources to begin and maintain small businesses in their communities. Many of the women who are involved with WRED are also active in Women's Institutes, and hold leadership positions in their local 4-H clubs, as well as participating in Agriculture in the Classroom programs in both rural and urban schools, with the assistance of OAFE. There is an attempt not only to maintain their own rural communities and identities, but also to educate youth and urban dwellers about the important role of agriculture in all our lives.

While women have become increasingly active in public roles and strategies for sustaining rural communities, gender inequities continue, and some would argue maintain a stronger hold in the traditions of rural life, than in the more rapidly changing urban settings.

The Past

There is a growing interest in the lives and social histories of our foremothers - and recently there has been a flurry of publications bringing to life the experiences and organizations of women who pioneered and sustained the rural communities of Canada over the past 200 years. Early Canadian author Susanna Moodie's experiences of **Roughing it in the Bush** in the Port Hope and Cobourg, Ontario areas in the 1830s is among the first documented histories of early Canadian immigrants from the perspective of a woman. More recently, a biography of Susanna Moodie and her sister Catharine Parr Traill (who was also a writer) has been published (Gray, 1999). Other historical accounts which help to shed some light on the lives of rural Canadian women, include: published diaries of an early 19th century farmer's daughter in Nova Scotia (McClare, 1989), the letters of rural women living in the Western provinces during the early decades of the 20th century (Lewis, 1998), a history of farm women's organizations in Alberta in the 20th century (Langford, 1997), a comparison of the feminist politics of rural Catholic women in Quebec and France (Black & Cuthbert Brandt, 1999), agrarian feminism and the politics of Ontario farm women (Carbert, 1995), post Second World War farm women in Ontario (Cebotarev in Parr, 1995), a centennial history of the Women's Institutes in Ontario (Ambrose, 1996), as well as academic theses on the subject by Halpern (1997), Cummins (1996), and others. There are also several historical collections related to the lives of rural children in Canada, including: Lewis (1996), and Cochrane (1996), as well as histories of the 4-H clubs (Canadian 4-H Council, 1982; Lee, 1995).

A common thread through all of these historical accounts is the courage and creativity of rural girls and women, in often inhospitable and heavily gendered environments. As Dahlstrom (1996) writes in her article on young women in rural Scandinavia, "the environment and society in the periphery are gendered male" (p.263) and "rural" as a concept "has a connotation not only of traditional economic structures, but also of traditional social patterns." (p.260). Despite the hardships, and perhaps because of them, Canadian farm women have worked passionately to maintain the family, the community and their rural identities. Over time, they became increasingly politicized and organized.

The legacy of farm women

"Growing up on a farm and seeing my mother function as a co-manager of the economic union gave me a strong sense of women's abilities." (Margaret Fulton, retired President of Mount Saint Vincent University, in Finlayson, 1995:22)

> "Growing up in a farm family has also helped me in my career. Farm women tend to be strong, because they have to be." (Amy Friend, Vice-President, ATS Aerospace, in Finlayson, 1995:282)

On the farm, both girls and boys begin their education in agriculture and rural living before they begin to walk and talk, as they accompany their parents at work each day. (See "Gathering Strength", National Film Board of Canada, 1989) In part, due to lack of organized day care, parents must have their children by their sides, as they go about their farm work. But the family farm has also, traditionally, relied on the contributions of all family members, young and old. Despite this reliance on the entire family's labour to sustain a farm, gendered roles and division of labour has been persistent, as has the subsequent 'occupational inheritance' of farm property from father to son(s) (Leckie, 1996).

As Mitchell and Troughton have argued (1999),

> The changes experienced by rural society affect members of rural communities in different ways .... fifty years ago women living in many rural areas of developed countries were all but invisible. Daily life for rural women was circumscribed by traditional roles on the farm, within the village and in the home..... the rural family was represented by the male farmer or other breadwinner, and women were seldom mentioned in research or policy regarding agriculture or other rural industry... However, alterations in society in general, including rural areas, over the last decades, and in conjunction with rural restructuring have resulted in changes in the role and status of women living in rural areas. (p. 1)

4-H Clubs: Head, Heart, Hands, Health

Social changes have been facilitated by various individuals and agencies. In rural communities, one of the most influential youth organizations has been the 4-H clubs. A rural based voluntary youth organization, 4-H clubs were initiated in Ontario in 1915, and are currently found in 80 countries around the world. Ontario, alone, had 14,545 members in 1995 (Canadian 4-H Council, 1995). 4-H clubs began when rural children lived in relative isolation, but they also reflected the gendered divisions of labour. Today, they compete with many other activities, but they have also evolved significantly, to the point that girls now make up the majority of the membership, and participate in all aspects of the increased variety of 4-H projects/clubs available to them. In the past, girls were segregated in the "homemaking" clubs, while the boys participated in a variety of agricultural activities from crops to various livestock clubs. The clubs share a hands-on learning orientation, they are led by local women and men who are themselves farmers and otherwise engaged in rural enterprises. While schools, particularly the larger, consolidated rural/urban schools, tend not to teach or engage in rural issues, 4-H continues to espouse the rural identity, the value of agriculture, and self-sufficiency. Leadership, public speaking and research are also significant components of each club. (Varpalotai, 1997) 4-H clubs, with their long history in rural communities, provide a good medium for examining the intersections between youth socialization, aspirations, and gender relations in rural communities (Varpalotai, 1996).

4-H is a rural tradition, passed on through the generations. In an earlier study on 4-H clubs in Southwestern Ontario, most of the current leaders had been 4-H members themselves, as youth. Many of them, particularly the men, were now farmers, and leading clubs in their areas of agricultural expertise. The women leaders tended to lead the former 'homemaking' clubs, now renamed and modernized as 'life skills' clubs. In theory, all clubs are co-ed., and as noted earlier, girls make up the majority of 4-H members, overall. Girls have now become active in the full range of clubs, with the notable exception of the tractor club (see also: Leckie, n.d.), boys, however, continue to gravitate towards the traditional agricultural clubs, with very few in the life skills types clubs, even though these are much more gender neutral today, and include such activities as photography, fishing, conservation, along with cooking, baking, and home crafts.

Those involved in the farm-related clubs hope that the exposure to different methods of farming will educate youth about options, new ideas, and instil a commitment to farming. In addition to the specifics of a particular aspect of farming, there are less tangible lessons to be learned: responsibility, team work, public speaking, and respect for the rural way of life. There is the ongoing worry that farming may not be economically viable for the next generation. While many of the parents interviewed privately hoped that one of their children would continue with the farm, most acknowledged that this was increasingly unlikely, and encouraged their children to follow a path of their own choosing. The children, meanwhile, expressed a great love for farm and rural life, and while few anticipated becoming farmers themselves, most wanted to remain in the community. The local community supports 4-H activities, through direct funding from the Women's Institutes and other local businesses, while farm sponsors host farm visits, and show support at Achievement Days and local fairs.

In an effort to keep 4-H, itself, viable, urban clubs have been promoted, and private funding is solicited since recent Ministry of Agriculture cutbacks have meant reduced support to 4-H. While this urban expansion is generally applauded, there is concern that the "rural" aspect of 4-H may be lost, that rather than introducing urban children to the rural way of life, 4-H may become so generic and "citified" as to lose its rural identity. But even those who live in rural communities are often not living on a farm. And this growing distance from the farm by city and rural folk alike, has many farmers worried. One outcome of this concern has been a growing network of Agriculture in the Classroom programs, coordinated in Ontario by Ontario Agri-Food Education Inc. (OAFE).

Agriculture in the classroom

The impetus behind the formal development of Agriculture in the Classroom programs in Ontario was a group called Women for the Survival of Agriculture (Ambrose, 1996, pp. 194-195). This group was formed in 1975 in response to the economic difficulties facing farms during the recession of the 1970s, as well as to draw attention to the contributions and needs of farm women. Curriculum guidelines were developed together with the Ministries of Education and Agriculture, and presented to school groups by local farmers, very often women. This initiative brought together agricultural commodity groups, 4-H clubs and their leaders, Women's Institutes, Junior Farmers, Federations of Agriculture, and others interested in bridging this growing rural/urban gap. (Varpalotai, 1997) For even as the lines between urban and rural schools and communities were blurring with increased urbanization and the consolidation of schools and school boards, the gap in understanding between these two solitudes was widening. Some Ontario farmers lamented that "students know more about dinosaurs than they do about growing food livestock" (Mann, 1995, p. 35), while David Suzuki, noted Canadian environmental scientist, commented that: "Cities disconnect us from the seasons, the weather. We lose that sense of connection because we live in a human-created environment.... children are not even aware that every bit of nutrition that enters their body was once a living thing" (MacAdam, 1996, p. 1).

Farm youth find themselves silenced, and their farm accomplishments ignored, in large urban schools. While some make a point of informing their teachers and peers about their agricultural pursuits and successes, and devote their projects and school presentations to rural issues, others are disturbed by the persistent stereotypes of farmers and rural communities. Even within rural communities, there is ignorance and misunderstanding as farming becomes more specialized and large corporations take over previously small and family-owned and operated farms. The influx of new rural residents from the cities creates friction as the smells, dust and noise of farming operations annoy those looking for the rural idyll. Teachers in a rural setting, though often from an urban background, are urged to carefully "assess the rural outlook held by the pupils, parents and residents of your community and be sure not to let your biases and theirs to conflict, harming a potentially encouraging educational environment" (Cross & Frankcombe, 1994, p. 42) On the urban side, OAFE encourages faculties of education to introduce prospective teachers to the numerous agricultural classroom resources, available to them free of charge. These resources are funded and often produced by various agricultural commodity groups, in cooperation with a group of seconded teachers who act as curriculum advisors and workshop facilitators. OAFE also has a major presence at the Royal Agricultural Winter Fair in Toronto each year. Schools organize educational field trips to the Royal Agricultural Winter Fair, visited annually by 40,000 students from the Toronto area. (Needles, 1997)

Rural Women: The Present

Even as these youth initiatives try to stem the tide towards a more urban-centred culture and society, rural women are encountering ongoing issues in their communities. Among the problems facing rural women are limited employment opportunities, absolute and relative isolation, lack of both public and private services (including day-care, health services, transportation, shelters for abused women....), and differences in perception of longtime rural residents and newcomers regarding the so-called 'rural idyll' (Mitchell & Troughton, 1999:2). Many studies of farm women show that despite their active involvement on the farm, very few identify themselves with the occupation of farming. There continues to be a high degree of sexual segregation of both on-farm and off-farm work, "women's work on farms was traditional, with most involved in book keeping and running errands and seeing themselves as only helpers. Farming was what their husbands did, despite their own often considerable involvement." (Ibid., p.7) Household duties, and child care, are still rarely shared, thus farm women often work two or three jobs: on farm, off farm, and domestic labour (including, housework, child care, and sometimes elder care). Younger women and girls have a different vision for themselves, unfortunately, this often entails leaving their rural community and farm. Thus, few young women aspire to become farmers themselves, farming continues to be perceived as a non-traditional occupation for women, and there are few female role models, since (as Mitchell and Troughton found) even their own mothers do not consider themselves to be farmers. (p. 11)

Nonetheless, though small in number, there are a growing number of women who identify themselves as farm operators, either independently or in partnership (Leckie, 1993). They are gaining more respect within the farming community, and, as Leckie notes, it was partially the farm 'crisis' of the late 20th Century, that began to bring some recognition and acknowledgement that without the contributions of farm women the "family farm might have been lost long ago" (p.213). Clearly, about half of the farming population is female. Yet, census data has not recognized female farmers adequately, giving primacy to legal farm ownership, deemed to be male most of the time. Still, the Canadian census has documented those women who have considered themselves to be 'farm operators', and while the actual number of both male and female farm operators has declined in recent decades, the proportion of female farmers has risen. Thus, Leckie's research finds that in 1971, 4% of farmers in Canada were females, by 1986 they represented 5 % of all farm operators, however the numbers vary by region (British Columbia has always had the highest proportion of female farmers, 11% in 1986, while the Prairie provinces had the lowest, at 3%)(p. 217). In total numbers, Ontario and Quebec are in the lead, with 3900 female farm operators living in Ontario in 1986. By 1991, Statistics Canada found that there were just over 100,000 female farm operators, representing 26% of all farmers, with 80% of the women working in partnership with at least one other person, 10% involved in larger partnerships (3 or more) and another 10% managing a farm on their own (in comparison to 57% of male farm operators) (Statistics Canada, 1995:67). Some of the differences between male and female farm operators include marital status and age - female farmers tend to be older, and are either widows or single, and also tend to be involved in less traditional or mainstream farming, such as smaller livestock (sheep, goats, and rabbits) and horticultural enterprises, such as greenhouses.

There is speculation that the growth in female farm operators can be attributed to a growing number of married women declaring themselves as farmers due to greater social acceptance and recognition of the work they do, and more women are likely to have an education in agriculture today, than in the past when rural girls gravitated towards home economics at Guelph (see: Normand, 1995), and finally, a greater number of the men are required to work off the farm, and so major farming responsibilities have fallen to the women (though this sharing of work roles has not carried over to the domestic sphere). (Leckie, 1993, p. 218)

Many of the women farmers started out as 'hobby farmers' before expanding into large-scale operations. Women are often blocked from entering the larger enterprises, due to cost of land and equipment, as well as quotas in certain supply-managed commodities. Women tend to operate with a smaller land base, and also have a smaller income, on average, than their male counterparts. As Leckie's research (and my own) finds, "Choosing farming as a career is not something that most young girls readily think about.... in fact, the majority.... had not considered farming as a possible or suitable occupation when they were going through school" (Leckie, 1993: 222).

> For women, the gendering of access to agricultural resources starts in youth and continues, in slightly different forms, into adult life as a farmer. In particular, the women interviewed indicated there were three major kinds of agricultural resources which were particularly constrained. These were (1) resources of knowledge and expertise, (2) capital resources, and (3) resources of interpersonal networks. (Ibid., p. 225)

In Ontario, Women in Rural Economic Development (WRED) was founded to address exactly these three concerns. Though its services are open to all rural women, not just those who aspire to farm, these are concerns shared by most women who seek financial independence, as well as a fulfilling career within their rural community.

Women in Rural Economic Development

Women entrepreneurs have only recently become a subject of interest, both to women and the general public, as well as the academic community. (Murray & Ferguson, 1998) A feminist perspective on this aspect of women's work was slow to materialize, partly because "feminists have traditionally looked to unions and governments for solutions to the 'feminization of poverty' and to redress power, resource, and economic imbalances." (Canadian Woman Studies, 1994:3) . While this collection is far-reaching, there is no article, as such, on rural women. Nonetheless, there are similarities in the barriers and opportunities faced by women from all walks of life as they embark on a business of their own. For many of the women, working for themselves allows the necessary flexibility to raise a family and attend to other responsibilities, it allows them to determine the extent of their involvement, provides an element of personal control and financial independence, and "allows variation in the degree of commitment at different times in their family and life cycles." (Ibid.) This latter dimension is particularly important to farm women who are called on to do various amounts of farm work as the particular farm and season requires it. Among the difficulties shared by all women entrepreneurs, city and rural alike, are access to credit, a network of like-minded mentors and peers, and social perceptions of women's roles in their families and communities.

A more recent issue of Canadian Woman Studies on Women and Work (1998), is broader in scope, encompassing a diversity of women and their work, including unpaid work, part-time work, and work in both the public and private sectors. Once again, there is no mention of the work of rural women, in general, or farm women, in particular. Tanner's recent (American) study (1999) on "The Entrepreneurial Characteristics of Farm Women", confirms that there has been very little research on the potential of farm women as entrepreneurs (p. 11). She notes that the Organization of Economic Cooperation and Development (OECD), sponsored a conference in 1987 to look at the role of women in local initiatives related to job creation. The conference predicted that by the year 2000, one out of every two business owners in the United States and

Canada would be female. (p.21) Member countries' governments were urged to encourage women's initiatives with regard to entrepreneurship. While the prediction for the year 2000 may not have been fully realized, there has been a significant growth in self-employment in Canada, though women lag behind men in this regard. According to a recent study by Hughes (1999), self-employment in Canada grew from 12.3% of total employment in 1976 to 17.8% in 1997, however only 13.9% of women were self-employed, compared to 21.1% of men. The gender composition of the self-employed workforce has shifted significantly, however, with women increasing from 25% to 40% of "own account" workers (those who are self-employed and working on their own) as compared to those who are employers in small businesses, where the growth rate of women went from 11.3% in 1971 to almost 25% by 1997. (Ibid.) Despite this growth, Hughes found the quality of jobs to be highly variable in this sector, and with mixed results as to whether self-employment contributes to gender equity and emancipation for women.

Self-employment for women, in general, is clearly linked to issues of child-care and work/family balance. Many women choose this route due to their life circumstances. While it gives them the flexibility they need to balance their responsibilities, the low pay, lack of benefits, and added stresses often leave women in an even more disadvantaged position than those in the traditional workforce. Rural women, in particular, tend to be engaged in home-based businesses. These businesses are often linked to agriculture, fishing, food processing, and craft work (Song, 1999). Newer home-based businesses in agricultural communities are also agri-tourism and professional service provision, due to increased access to new technologies. While these small businesses in Canada often are intended to provide a supplementary income, in many developing countries these female-led businesses are often the mainstay of the family. (Ibid.)

The growing body of research on women entrepreneurs has consistently found that strong professional and social networks and access to education and training opportunities are essential to the success of these women and their businesses. While these supports are important for all women entering the business world, they are especially important for women in rural economic development. These support networks provide the woman business owner with business skills she feels she lacks, access to the business and life experience of those in the field longer, and emotional support (Tanner, 1999: 36-37). Tanner notes that while women entrepreneurs and rural women have been overlooked for the most part, until recently, farm women have been the least represented in historical literature: "possibly because plowing a field, slopping hogs, churning butter, making soap, emptying chamber pots, and washing work clothes were not looked upon as great achievements. These tiresome chores, however, kept many a farm business from going under" (p. 42).

Farm women's organizations were also slower to develop than more general women's organizations or general farm organizations. The Women's Institutes were a spin-off from the larger farmers' institutes. Though the original Women's Institutes were centred around homemaking skills and community service, subsequent farm women's organizations became more political with regard to rural economic development, saving the family farm, and the improvement of agriculture. (Tanner, 1999, Shackleton-Verbuyst, 1998) While Women's Institutes were sometimes criticized for reinforcing traditional gender roles for girls and women in rural communities, they also enabled women to become active in a more public sphere on issues of most concern to them. Women gained experience with public speaking, developed a social network, and began to trade skills and create products for local community fund-raisers. While today the membership of the W.I.s tends to be an older generation of women, they continue to support youth activities such as the 4-H clubs, and have arguably provided a platform for other women's groups, such as the Women's Rural Economic Development (WRED) network. Tanner suggests: "as the farm woman's horizons and involvement with their community and their world expands, their skills and experiences, both on and off the farm, are increasingly recognized as valuable personal and professional assets easily transferable to ensure success as entrepreneurs." (p. 49).

Farmers are considered to be self-employed. The literature on successful entrepreneurs indicates that they tend to come from families that are self-employed - so in some respects, entrepreneurship comes naturally to farm women. Tanner's research, as well as my own, has found that farm women are often active partners on the farm, they tend to look after the business affairs, such as the book-keeping, payroll, purchasing supplies, and other related tasks which transfer easily to other entrepreneurial enterprises (Tanner, 1999:92) Garvin & Associates (1993) in a commissioned study on the Training Needs of Canadian Farm Women, found that:

> The role of farm women has changed. The evolving attitudes and values of today's farmers have led to an emerging role for farm women; that of the managing partner. The size of the farm women's population, coupled with their management influence, necessitates that training opportunities be developed and offered to prepare them for the economic challenges of the future.

As in my own research on WRED members, Tanner found that among the characteristics of successful female rural entrepreneurs, these women tend to be married, middle-aged, and relatively well-educated (often better than their husbands). There also seems to be a correlation to a significant number and variety of memberships in other organizations. My sample, while much smaller, has not found such a strong correlation - for about half of the WRED members I have interviewed so far, WRED is the only formal group many of them are currently involved with. This may be because traditional farm organizations have not actively recognized the role and contributions of women. But as Tanner suggests, more research is needed on the value of networks for rural women entrepreneurs. She concludes that women have tremendous potential for making a contribution to the agricultural economy in a rapidly changing world (p.97) the continuing issue is how to "foster the advancement of women as entrepreneurs and in some way foster the recognition and promotion of valuable resources to assist rural communities in current efforts to revitalize and insure a stable and prosperous future." (p.97). This is where Ontario's Women in Rural Economic Development organization becomes relevant.

Ontario's Women in Rural Economic Development organization was founded in the early/mid-1990s in response to calls for an organizational response to the needs of farm women from various existing organizations (the Ontario Farm Women's Network, Canadian Farm Women's Educational Council, and others). Conferences at both the national and provincial levels identified the training needs of women farmers/mothers who were planning to enter or return to the workforce. Many of them had served as community volunteers in the past. A number of pilot sites and community networks were created with both federal and provincial support, in order to initiate entrepreneurial training in rural communities. Individuals with adult education experience, college teaching, agricultural backgrounds, and 4-H involvement, were recruited to facilitate these early 'self-help' groups. Formal WRED training programs began in March, 1994, and the first (and continuing) Executive Director, Carol Rock, was hired that June. Rock was herself a farm woman who sought work that wasn't farm related and recognized the need for training and support for rural women who wished to become self-employed. (Helms, 1999; Rock, 1999)

WRED is a unique rural organization for Ontario women. While it met with some resistance in the production/agricultural sector, the women were very receptive to community economic development and diversification. Their male counterparts were more wedded to continued farming, in the traditional way, despite declining revenues from that sector. The Ontario Ministry of Agriculture and Rural Affairs was at first a reluctant partner, but it has since become one of the core funders of WRED's programs. Seemingly natural partners such as the Ontario Women's Directorate turned down WRED's initial funding applications because it did not fit directly with the OWD's mandate at the time to deal with violence against women issues and support for immigrant women. These early growing pains continue to characterize the challenges WRED faces in maintaining ongoing funds and resources to keep its programs going (Albert, 1998). Helms (1999:11) notes that "the novel concept of rural women training rural women brought some gaping stares back in 1993, but Rock persevered. 'Rural women have always been known for their enterprise, especially in a business such as farming, that has its well-known ups and downs'."

The WRED program was geared to rural women who had issues of isolation, access to formal training and education, need for flexibility in their schedules, child care, and other concerns to contend with which, while present in urban women's lives as well, are exacerbated for rural and farm women. WRED trained local trainers to deliver programs in various communities, develop stable networking groups in each area, and solicit sponsorships from government and private sources. Groups and programs have been formed for girls and young women, as well as adults. One model which has become popular in various parts of southwestern Ontario is the dinner and networking groups. Local coordinators organize dinner meetings on a quarterly basis, usually at community restaurants or catered by local businesses, and invite guest speakers to talk about topics of interest to rural women entrepreneurs. Between these dinner meetings, other meetings may take place where the women share issues and successes pertaining to their businesses, learning from one another in the process. These gatherings also provide an avenue to promote their businesses, practice marketing and public speaking skills, and learn about new resources, ideas, and tips from others in similar situations. WRED facilitates alliance building groups in order to bring together women with compatible businesses who might benefit from formal or informal partnerships, either through buying supplies in bulk or combining their products or services in new ways. WRED also provides one on one consultation with individual businesses to review business plans, marketing tools, etc. Perhaps one of the biggest contributions of WRED is providing start-up loans to businesses just getting underway. One of the greatest obstacles women have experienced in the past is getting bank loans and being taken seriously by mainstream financial and other organizations.

WRED is making plans to expand into northern and eastern parts of the province, including Francophone communities. There have been links to international community development agencies where projects aimed at women's economic self-sufficiency are more advanced than they have been in Canada. WRED currently involves approximately 3000 women per year in various networks, 400-500 women take part in training programs, administered by 8 full-time staff based in a Stratford, Ontario office. The organization receives no core funding, it is all project based, which makes its work and ongoing planning somewhat tenuous. Funds for interns are provided through the Royal Bank, other funds are from various government sources, with some private sponsors. Annual funding totals approximately 1.5 million dollars. WRED maintains a resource centre, a web site and a regular newsletter. As of the 1999 Annual Report, WRED had, since it was founded in 1993, provided business development assistance to 525 women, with estimated gross sales of $10,000,000. There are over 450 new businesses operating in rural Ontario because of WRED initiatives (WRED, 1999 Annual Report, p. 2).

Among related new initiatives underway is an "Institute for Rural Women" in partnership with Guelph University. There has been recognition from both the federal Minister of Finance, and the Minister of Human Resources and Development that rural issues and community development are important to Canadian prosperity and to narrow the gap between the rich and the poor. WRED endeavours to provide greater access to capital, networking, training and mentoring for new and existing businesses established by rural women. WRED is available on an ongoing basis to groups and individuals in need of its services, advice or resources. (Bancroft, 2000)

In her study of WRED, Albert (1998) argues that the value of local entrepreneurs is just that, they are local and they "tend to be members of the community who are grounded in that community. Profits generated by a local business tend to recirculate in the local economy, rather than leave the community" (p. 59) Women who have faced inequities and barriers in mainstream workplaces are particularly attracted to starting their own businesses where they are able to maintain control, flexibility, and accommodate multiple responsibilities. While this still reflects the disproportionate demands on women, and the ongoing difficulties in having their businesses taken seriously, WRED has helped to mediate and facilitate some of these initial barriers through their programs, services and support networks. Nevertheless, Albert argues that "encouragement of women-owned businesses does not automatically address some of the inherent inequities in the economic and social spheres" (p. 68). WRED, itself, continues to face financial and geographic challenges in its efforts to help sustain rural women in their small businesses. (Ibid., p. 122-124) WRED needs to be able to keep in touch with its members, local community networks, provide and exchange information, and remain accountable to government and other funding agencies in fulfilling its mandate to address the economic needs of rural women. WRED is a multi-faceted organization, filling a niche for women who have not traditionally been heard or well represented by other organizations.

Summary and Conclusions: The Future

Among the themes cutting across all rural women's initiatives are the need to access resources of both knowledge and expertise; access to capital resources; and the need for interpersonal networks for both support and further education. Further to these is an apparent need for female role models, mentors, and leaders. Rural women have shown remarkable initiative and creativity over the past two centuries. They have risen to the challenges of constant `multi-tasking', the rigours of farming and rural life, and the potential for new community and individual activities to help sustain their communities and their own rural identities.

There is a need for further support of these initiatives if rural communities and local enterprises are to not only survive, but thrive amidst local and global change. Rural women have made it known that they need further training related to farm business management, as these responsibilities increasingly shift to women; they also identify a need for off-farm skill development; and finally, they want personal development training in the areas of entrepreneurship, leadership and self-esteem. These need to be accessible, preferably provided in their own communities with flexible timing and other options. As computers become more common in farm homes and rural libraries, there may be greater acceptance and demand for distance delivered courses. (Garvin & Associates, 1993) But overall, women need networks of like-minded women with whom to share the trials and tribulations, successes and resources of their work experiences. Although rural women's needs (and contributions) have traditionally been overlooked, the dramatic changes affecting rural Canada have made it clear that there is an urgent need to include women as full partners in rural economic development.

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The Real Cost of Rural Schooling in South Australia From a System's Perspective

Mark Witham, Australia

Introduction

This paper examines the costs of rural schooling in South Australia by examining systemic data using a statistical approach. The specific research questions are:
How does the State Department of Education, Training and Employment allocate funding to schools?
What are the relative payments to different schools and communities?
How do the mechanisms and implicit policies meet the criteria of cost efficiency and vertical equity?
A second issue was whether the way that secondary schools allocate resources is congruent with how the Government allocates resources to schools.
This study is one of three separate studies undertaken as part of the Author's PhD thesis. One of these separate studies examines the allocation of resources from a school's perspective. It shows the implicit policy of allocating resources within country and metropolitan schools. It is clear that the basis for allocating resources at the system level is not congruent with how schools themselves allocate resources. The particular policy implication of this mis-match for rural schools relates to the allocation of resources to senior secondary students. The system assumes that senior secondary students require significantly more resources than schools actually allocate. Schools re-allocate these surplus resources back to junior secondary students in both country and metropolitan areas. Country schools tend to have relatively lower retention to year 12 and thus have less surplus resources to re-allocate compared to metropolitan schools.

Literature

Introduction

Caldwell, Levacic & Ross (1999,pp.20-24) put forward four generations of funding formula that have been used to provide resources to Government schools. These are:
First generation funding formula were simple pupil/teacher ratios supplemented by per pupil grants. These formulae assumed that all students had the same learning needs and hence only achieved horizontal equity. Caldwell et al assert that this type of crude formula could be usefully applied in developing countries.
Second generation funding formula were developed to take into account that all students are not the same, with different learning needs requiring greater levels of resourcing. These formulae included a per-capita amount for all students plus an additional amount for students with particular learning needs. Caldwell et al point out that the additional needs-based amount was not determined by any consideration of what these students required to achieve a particular level of attainment - they were simply politically determined amounts distributed according to an index based on some statistical measures of learning needs. This point could equally be made about the per-capita amount for all students. Reschovsky & Imazeki, (1997) also found that "*as far as we can determine, the process of determining the weights assigned to low-income children often reflect political considerations rather than estimates of the true costs of educating children from economically disadvantaged families*".
Third generation funding formula have the characteristics of comprehensiveness (inclusive of all costs of educating students at the school level), cost-based (related to the costs of providing specific programs for students with different learning needs) and incentive appropriate (encourages schools to act consistently with Government policy objectives).
Fourth generation funding formula have the characteristics of third-generation formula, but ensure that like students are funded the same regardless of the school they are in. They also relate the funding to learning outcomes.

Government Education in South Australia is currently in the process of moving from a second generation to a third or perhaps fourth generation formula.

Inputs and Outputs

It seems that between the first and second generations there is a shift from input to output funding. This is a major change in educational funding, which is in line with Government budget reform that has occurred in almost every Australian State and overseas. The reform is often associated with a shift to smaller central agencies and a clear separation between Funder, Owner, Purchaser and Provider functions of Government. In education the schools are the provider, the small core central agency is the purchaser and the Government with an appropriate Minister as its agent is both Funder and Owner.

The Government typically sets high-order policy objectives and funds these at the political level of

Minister and Treasurer. The funding is then used by the core central agency to purchase outputs form the providers. In the case of education the output is 'students taught'. This is an important point, no longer does Government purchase inputs such as teachers, goods and services. At one level it does not really care about what inputs are used - only that the outputs defined **as the services which the end-consumer receives** are produced to an agreed level of quality. The Government may include in its definition of quality a particular ratio of pupils to teachers, which does ultimately specify the mix of inputs.

In the Funder-Owner-Purchaser-Provider (FOPP) model, the high-order policy objectives set by Government are not the responsibility of the agency to achieve. The agency is only accountable for delivering the outputs to an agreed level of quality. In education this means that the Education Department is accountable for educating students and ensuring that they reach a given level of attainment or achievement. The Government is accountable for whether the strategy of funding education actually achieves future benefits to society. This separation of accountabilities is illustrated by the 'accountability line' in the following figure 1.

The accountability line divides what are the responsibilities of the Funder/Owner (the elected Government) and the purchasers and providers (Government Education Authority/Government Schools). The indicators of Cost, Quality and Efficiency are common measures of the performance of Government Schooling and the indicator of effectiveness a measure of the performance of Government. More realistically perhaps the latter is a measure the Government uses to compare the strategy of funding education with other policy options that may achieve the same benefits to society. These other options might include funding less education and legislating or spending in other policy areas of Government. It should be noted that there are other views that differ from this model. A common view is that the cost measure is an indicator of efficiency (SA Department of Treasury and Finance, 1999) and the efficiency measure is an effectiveness indicator. With such an approach the relationship shown as effectiveness in the above diagram is sometimes ignored and other times included as a second effectiveness Measure. The problem with this approach is that it assumes no qualitative difference between a class size of 10 or 200 students. It appears that those advocating such an approach are simply transposing models developed in other areas of the economy including government activities such as public transport and water supply. The transposition may be a standardised process without consideration of any differences between education and other sectors of Government.

The accountability line can also be considered as the "leap of faith line", where one has to leap many years and possibly several generations to determine whether the investment in education does in fact achieve the long term objectives which the Government intended. It seems that many researchers of the various aspects of production functions are prepared to take the leap of faith.

Under the FOPP model the Government funds central agencies to purchase a specified amount of outputs. It uses a funding agreement and a price per output is included in this document. In the absence of an educational market, the price paid by the Government for the output of students taught is based on the cost.

The agency can not defend some of the input based funding policies in its negotiation with Treasury and the Government. It can not for example defend minimum provisions, maximum provisions nor threshold provisions inherent in many of the current input based allocations. In its simplest form the funding agreement between the Government and the Education agency will be based on the formula:

X students x $Y average expenditure per student = $total recurrent funding.

Output Models

The literature describing what the second and third generation funding formula should look like appears to be converging on a single generic approach as follows:
Per-school base funding
Per Student funding for all students
Additional per student allocations based on year levels
Additional per student allocations based on learning needs of students

This generic model is put forward by Odden and Busch (1998, P.157) in their 1998 summary of best practice educational resource allocation from around the world. One of the systems Odden and Busch examined in detail was the Victorian Education Department in Australia. The generic model above does not include the priority programs category included in the Victorian global budget. The Tasmanian Global budget formula (which excludes staffing resources as these are allocated on an input basis) has the same categories as the best practice model above (1993, p.65).

Principles

"Five values or objects of policy that have been historically prominent in shaping Western societies and are also particularly relevant to making decisions about the provision and consumption of educational services are liberty, equality, fraternity, efficiency and economic

growth." (Swanson and King, 1991, pp.22-3 cited in Caldwell, Levacic & Ross, 1999, p.12) Caldwell et al, link these values to funding schools. Liberty is interpreted as choice and diversity of Government schools available to students. Equality relates to horizontal equity such that a particular type of student should attract the same funding regardless of which school they are in. Fraternity means that all types of students are welcome in any school regardless of their background or disability. Efficiency simply means either providing the highest possible output with a given input or the least cost provision of a given output. Economic growth means that the students leaving the education system should have certain knowledge, skills and attitudes; which are inducive to economic growth.

The Education committee in Victoria (Education Committee, 1996) established high-order principles to guide the development of the global budget. These were:

Pre-eminence of educational considerations (Determining what factors ought to be included in the construction of the School Global Budget and what ought to be their relative weighting are pre-eminently educational considerations.)

Fairness (Schools with the same mix of learning needs should receive the same total of resources in the School Global Budget.)

Transparency (The basis for allocations in the School Global Budget should be clear and readily understandable by all with an interest. The basis for the allocation of resources to each and every school should be made public.)

Subsidiarity (Decisions on resource allocation should only be made centrally if they cannot be made locally. Decisions on items of expenditure should only be excluded from the School Global Budget if schools do not control expenditure, if there is excessive variation of expenditure, if expenditure patterns are unpredictable, if expenditure is once-off, or for expenditure for which schools are payment conduits.)

Accountability (A school which receives resources because it has students with a certain mix of learning needs has the responsibility of providing programs to meet those needs, has the authority to make decisions on how those resources will be allocated, and should be accountable for the use of those resources, including outcomes in relation to learning needs.)

Strategic implementation (When new funding arrangements are indicated, they should be implemented progressively over several years to eliminate dramatic changes in the funding levels of schools from one year to another.)

Methodology

Financial Analysis and Regression Analysis of State Funding to Government Schools

A very detailed analysis of Departmental Ledger information for the 1997/98 financial year was undertaken to establish the Department's implicit funding policies. This involved mapping expenditures by project, cost centre and Director. All expenditures that were recorded as being expended in school cost centres were allocated to the school. Expenditures incurred in cost centres other than schools were allocated to various support services, other outputs such as TAFE and preschools and to capital investments.

The analysis of actual expenditure represents the implicit funding policy in 1997/98 financial period. The model used to analyse the implicit funding policy is shown in Figure 3.

Analysis of Implicit Funding Policy Using Multiple Regression Analysis

Actual Expenditures and Actual Teacher Salaries

The expenditures directly relating to schools included actual salary payments and reflected the lower salaries paid to generally younger teachers in country schools. In the work of Monk et al (1996) both actual and State-average teacher salaries were used to determine whether differences in the funding to different school districts were due to actual salary differentials or to class size differentials. They found that salary differences partly explained the differences, but that differences within a school or a district were explained by class-size differentials. This study also investigates the implicit funding policy for schools using actual and average salaries to determine the impact on differences in funding between metropolitan and country schools.

The expenditures recorded at individual schools excluded capital expenditures but included 'one-off' arrangements and special deals that are not part of the main funding policies of the department. The basis for the allocation of expenditures directly to schools included a large range of different funding mechanisms. The methodology examined the different mechanisms including the 'one-off' arrangements to determine the underlying factors within each formula. These factors included student numbers, student background, student year levels, and school type. The total expenditure recorded at each school was compared to statistics for each of these factors at all schools using the statistical technique of multiple regression. The SPSS software package was used to undertake this analysis. The fact that most resource allocation formulae in place were linear in that they related resources provided to the number of students in each school lead to the choice of multiple regression analysis as a tool to discover the statistical nature of this relationship. For each school we had a known outcome (the total expenditure) and a range of known predictors (number of students in each year level, number of aboriginal students, number of school card recipients etc.) The multiple regression analysis sort to establish a system-wide implicit policy for resource allocation. To do this the data for all schools was analysed as one data set. Another option would have been to analyse country schools and metropolitan schools separately, to determine whether there were any significant differences. This was not done because almost all of the likely factors that would impact on the amount of resources provided to rural schools were universally applicable to all schools. This means that small metropolitan schools also relatively high expenditures as did small country schools. The fact that more of these schools were located in the country means that overall the country schools receive greater per-capita funding. This is due to an underlying policy relating to population dispersion and school provision. Similarly the younger teachers typical in country schools result in generally lower expenditures on a per-capita basis - and metropolitan schools with younger teachers would be treated the same. The exceptions to this 'equal treatment' approach to metropolitan and country schools allocations are very small in magnitude. They include the Country Area Schools Program amounting to $1.3m.

Findings

What mechanisms are in place that the State Agency uses to transfer resources to the schools? and what are the actual amounts?

In 1997/98 the department's total expenditure was $1.6bn. This expenditure was allocated to the outputs of Children's Services, Government Schooling and Vocational Education and Training. Government Schooling represented 76% of the total spending. The first implicit policy decision by the agency is how much of the total available funding should be allocated to each of these major output classes.

Within the 76% or $1.2bn that was allocated to school education about $927m was directly allocated to schools and $296m was spent corporately on behalf of schools. The mechanisms for allocating the $927m to schools are complicated and numerous. They interact with each other so that the final allocation policy is far from transparent. The following analysis made the implicit policy of resource allocation visible for the first time. It raised the questions of what educational rationale existed for the allocations to particular groups of students, year levels and school types.

As the Department for Education Training and Employment only formed in 1997, it has not yet had the opportunity to evaluate whether this particular allocation policy was the most effective use of $1.6m or whether alternative allocations would produce better community outcomes. If the relative allocations to these major areas of activity are not deliberately considered and perhaps challenged, the historic "what has always been" remains the implicit policy. (Note: in addition to the $2.5m provided to Private Schools from the Budget for Government Schools there is an additional $250m provided via a Ministerial Secretariat.)

Resource Allocation Directly to Schools

Within the 76% of spending on R-12 Education $927m was directly allocated to schools and $296m was spent corporately on behalf of schools. The policy on how the $927m was allocated is contained literally in a book (the staffing formula) and in various other files. Whilst these mechanisms were complex and numerous it was possible to summarise them into a quite simple form by the use of regression analysis.

This statistical technique compared the expenditure to the following features of each school for the financial period 1997/98:

School Type
Number of Children in years R-2
Number of Children in years 3-7
Number of Children in years 8-10
Number of Children in years 11-12+
Number of Children who are also Aboriginal or Torres Strait Islanders
Number of Children who are also school card recipients
Number of Children with disabilities who are integrated into mainstream classes
Number of Children with disabilities who are in special classes
Number of Children who are from Non-English Speaking Backgrounds
Measures of rurality.

This analysis provided an extremely good statistical explanation of how resources were allocated. The analysis also investigated whether the country/metropolitan location of the school made any difference to how resources were allocated and it had no statistical impact. Two measures of rurality were used in separate regression analyses, the Departmental definition of country/metro and the GSAF. Neither measure was statistically significant. This did not mean that country schools received the same funding as Metropolitan schools but rather that the reason why country schools got relatively more funding was due to factors such as school type (particularly the large fixed base allowance for country R-12 schools and smaller enrolments. Additional funding was not allocated for reasons of geographic isolation.

Area (R-12) schools attracted a larger base "per-school" funding than the sum of the per-school bases for a primary school and a high school. This higher base or per-school funding was spread over fewer students so the per-student funding in country schools was higher than in metropolitan schools. This could be a reflection of the additional expenditure that was provided to country areas through the Commonwealth's Country Areas Program, Ready Set Go (VET in schools funding), and possibly the Department's freight grant. This latter grant has almost no relationship to the freight costs of a school and in 1995 the Department introduced a state-wide courier service that essentially equalised country freight expenditures to that of metropolitan schools - effectively rendering the freight grant redundant.

The decision as to which variables should be included as part of the existing implicit resource allocation was ultimately made on an objective basis by iterative use of the regression analysis to find the variables which gave the highest statistical correlation with expenditure or the "line of best fit". In statistical terms an adjusted R square figure of 0.96 was achieved, which is almost perfect correlation. This better than anticipated result was almost too good to be true and would normally occur through an unintended data error. However the entire analysis was independently vetted by Dr. Sheldon Rothman the Department's Chief Statistician who confirmed the figures. The statistical analysis revealed the following:

Whilst such a high correlation is unusual, it occurs due to the fact that almost all of the expenditures on each school were formula-based and these formulae were in turn based on the factors used in the regression model. The 4% of expenditure not explained by the model included some data errors where a small number of schools had very large expenditures recorded in the ledger as maintenance, which were associated with major capital redevelopments. A second reason for the unexplained variance is that the model did not include a variable for salary step in the teacher pay-scales. As such the model allocates average salaries, while the ledger records actual salaries. This issue is revisited later in this chapter, when the entire regression analysis is repeated using average salaries.

What is the implicit policy?
The outcome of the statistical analysis was an implicit resource allocation formula as shown in Figure 7.

These figures were re-presented to a formula that had the following major features .
A fixed Base allocation for each school that did not change with enrolment. This in effect related to the fixed component of all major inputs. (Salaries included a Principal, and groundsperson , the school support grant had a fixed base, utility charges included a fixed rental amount etc.)
An additional allocation for each school that did not change with enrolment and was based on school type.
A per-capita base allocation that was allocated for every student.
An additional per-capita allocation for particular students based on their year of study
An additional per-capita allocation for particular students based on some other student-related statistic such as their aboriginality, or whether they were school-card recipients.
This new presentation is shown in figure 8.

This model makes explicit the relative importance that each compensatory funding bucket had at the time and we can see at a glance what additional resources were provided to students in special classes or to year 10 students for example. It also begged many questions such ***as what was the policy rationale for these allocations?*** and ***did these allocations reflect sound educational research findings and practice?***
This formula had the potential to replace the plethora of then existing allocative mechanisms and achieve at least 96% of the same outcome.

The high amount of additional resources provided to years 11 to 12+ was surprising and resulted in some detailed rechecking of the analysis, (which was again found to be correct). Why did Years 11 and 12 attract more than double the total per-capita resources that years 8 to 10 attracted? The reasons are a compounding of the following factors:
Slightly higher denominator in the staffing formula 29 in years 8-10 rather than 26 in years 11-12
Slightly more generous Non-Instruction Time Allowance (18% rather than 15%)
The allocation of relatively more of the per-capita support grant to part-time than full-time students
The allocation of staff on the basis of February enrolments when a significant number of students leave during the year. The statistic used in the regression analysis is the average of June 1997 and February 1998 full-time enrolment. It is acknowledged that the average of February and April Enrolments is used to allocated staff to secondary schools with total enrolment greater than 300. Primary schools are staffed on a term by term basis to reflect the reality of increasing enrolments through the year.
These features of the staffing formula are amplified by the allocation of SSO salaries, professional development grants and furniture grants on the basis of teacher numbers.
Potentially more teachers at the higher end of the salary scales, reflecting more senior staff and more experienced staff.

When this feature of the allocative methodologies was shown to officers in the Department, one secondary principal pointed out that in his school these resources although provided for year 12 were actually used to teach earlier years of schooling. A similar response came from a former school principal working in the Human Resources Policy area. This view was supported by analysis undertaken within 4 schools in 1993 as part of the Junior Secondary Review (Witham, 1993), which found that in 3 of 4 schools with secondary enrolments, years 11 and 12 resources were allocated back to years 8,9 and 10. The exception was an area school, which didn't enjoy the good fortune of a large senior secondary enrolment and so could not reallocate these additional resources to the junior secondary years.

In the 1960s when enrolment in year 12 was much lower, the curriculum was narrower and when students were not treated as much as independent learners, this policy might have been appropriate. Officers in the Department's human resources policy area were able to point to a specific officer responsible for the policy that was developed in the late 1960s. In 1998 the very small year 12 physics classes are now supplemented by a range of larger classes and in very many schools year 12 students have 20% of their timetable unsupervised.

System Expenditure on Behalf of Schools

In 1997/98 the following expenditure was incurred corporately on behalf of schools:

On top of these expenditures there was an additional $117.6m of expense which related to depreciation of school buildings and major capital upgrades of school buildings. Figure 10 shows how total
resources are allocated to the outputs of Government schooling, Vocational Education and Training and Children's Services (preschool and childcare).
Figure 11 shows that it has been possible to deconstruct the total school expenditure into a base for all students, a base for all schools (per-school allocation), additional per-capita allocations to schools and other corporate expenditures made on behalf of schools. The expenditures in figure 11 have be ordered into priority to understand the relative magnitudes of each component of funding in the School Expenditure Pyramid in Figure 12. This pyramid shows the relativities between the base and the various compensatory and year-of-study based allocations.

How do the mechanisms and implicit policies meet the cost efficiency and vertical equity criteria?

Cost efficiency
Earlier the issue of year level funding allocations was highlighted and related back to policy decisions made in the late 1960s. While it is easy to rationalise this anachronism of the staffing formula away, by saying that schools can reallocate to earlier years, it is not equitable to those schools (particularly those in the country) who do not have high enrolments in year 12. Some country schools have no year 12 classes and perhaps this is a cycle in part caused by there being relatively less resources available in years 8-10. In any resource allocation methodology it is fundamental that resources be directly allocated to where they are needed and not to somewhere else with the hope that they will then be re-allocated.

Later in this chapter the actual year level funding relativities for eight case study schools are discussed. It is apparent from this analysis that the internal re-allocations by both metropolitan and country schools are significantly different to those implicit in the Departmental allocative mechanisms as shown in Figure 13

Figure 13 Presents evidence of two mis-allocations of resources that may indicate that the cost efficiency criterion is not being met. Firstly the allocations to year levels do not accord with school practice nor the educational theory relating to year level funding discussed at length earlier in this paper. The second issue is that there are apparent differences in how country and metropolitan schools allocate resources internally, that are not reflected in the resource allocation methodology. The numerous resource allocation mechanisms briefly mentioned are themselves indicative of an inefficiency in the actual allocation methodology. As shown in figure 11 there are significant out-of-school expenditures related to the different funding components. For example the Aboriginal Education and Disability Services areas provide some services directly to schools but also include significant central office bureaucracies. This represents a leakage of funding away from the students that the funding is targeted to. This issue is taken up again in the next section.

Vertical Equity
Figure 14 is a conceptual diagram of equity funding, where every student receives a base per-capita funding of ***A*** and students who meet a needs criteria of greater than point 1 receive increasing amounts of equity funding. For simplicity suppose that student need translated into lack of wealth - students at point 0 are very wealthy and thus get no needs funding. Students at point 1 are moderately wealthy and also get no needs funding. Students to the right of point 1 are in increasing need and get progressively more funding. Whilst this model is a straight-line simplification of the range of different needs that exist within education it is a useful starting point to discuss the implications for resource allocation.

Where we locate points ***A***, ***B*** & ***C*** are policy decisions for which the range of statistical measures such as the Griffith Service Access Frame (GSAF) and the ABS measures of poverty provide no clues at all. Perhaps all students have some degree of need and point ***B*** should be located at point ***A*** or even at point ***0***. Perhaps the base funding is too generous and over-resources the most wealthy students at the expense of the least. Perhaps the students in most need are not adequately funded and point ***C*** should be higher - given a fixed total basket of resources this means that we can either reduce the base below point A or increase the needs threshold beyond point ***B***. The concept of compounding disadvantage where a critical mass of students in one or more needs categories are in the same school could be accomodated within this approach by the development of a non-linear function so that the line BC is convex. The measures of socio-economic disadvantage used in the Department's equity funding formulae were based on either the percentage or number of school card recipients.

To redraw the funding model based on the school card measure it would look like figure 15. Students are either school card recipients or not, which does not reflect the continuum of need that exists. One defence that is put forward for the school card model is that the commonwealth literacy program funding is allocated to schools with more than 60% school card recipients in its enrolment. A school with 61% school card receipients will get funding even though the students may have only just qualified for a school card. On the other hand another school with 100% of students who just missed out on a school card will get nothing. Thus this defense of school card is not a strong one. Figure 15 depicts a student at point 1 attracting a amount of funding B1 which is almost completely mistargeted. The only students getting all the targeted funds are those at point C with the most need. What this illustrates is that approximately half of the $70m funds allocated using school card are mis-directed. This is an issue of concern. If we adopted a continuous measure such as a an ABS measure of Poverty it would free up approximately $35m so that those in most need could get up to double the equity funding they were getting in 1997/98.

Analysis of 1999 Data using a budget and standard cost approach

The regression analysis described so far related actual expenditures in the 1997/98 financial year to the average enrolment in schools in these years. Conspicuous by its absence was the impact of rurality. The rural nature of every school was tested and found not to have a statistical impact. The measures tested included the Departmental measure of Country or Metropolitan, whether a school received Country Area Program funding and the schools score on a statistical index known as the Griffith Service Access Frame. None of these measures had any explanatory power as to the policy basis for allocating resources to schools. Yet it was apparent that the Department did have a Country Areas Program that provided $1.2m to schools on the basis of geographic isolation. This was a relatively small amount in a budget of $927m directly allocated to schools. It was also apparent that country teachers were generally less experienced than metropolitan teachers and on average earned lower salaries. Intuitively this factor would result in funding being less for rural schools, all other things being equal. In 1999 a budget was constructed for all schools using average teacher salaries and entitlements rather than actual expenditures. This separate analysis showed that rural schools were provided with an additional $8m on the basis of rurality. This provides an indication that the implicit policy on actual expenditures includes two opposing forces that cancel each other out. Firstly there is a policy of providing more funding to rural schools on the basis of rurality and secondly there is a policy of providing relatively less funding for teacher salaries because of the lower teacher salaries - and the possibility of higher teacher vacancy rates.

The 1999 analysis has to be interpreted with a degree of caution. Because the analysis was based on budget or entitlements it excludes all expenditures below entitlement and over entitlement. Schools that are more difficult to staff are more likely to have vacancies. This means that an analysis of entitlement figures will overstate the funding provided to more difficult to staff schools. Similarly if some schools are more likely to have higher than average staff absenteeism, the entitlement to teacher relief will understate the funding provided to these schools. It is possible that both of these factors are more prevalent in rural schools.

Summary and Conclusions

The State Department of Education, Training and Employment allocates funding to schools in much the way that the literature suggests is a generic basis for funding schools. That is a:

Per-school base funding
Per Student funding for all students
Additional per student allocations based on year levels
Additional per student allocations based on learning needs of students.

This paper presents this implicit funding policy for South Australian schools for the first time. It shows that the year level allocations are counter to the universal consensus in the research literature. That is senior secondary funding is a priority at the expense of junior primary funding.

The funding for rural schools is overall not statistically significant although it is possible that this outcome masks two opposing factors. Not with standing this possibility the analysis shows the funding provided to schools on the basis of aboriginality and relative poverty, quite separately from that provided for rurality. The funding provided for 'per-school' allocations are the same for country and metropolitan schools. When these fixed amounts are divided by the generally smaller enrolments in country schools it results in higher per-student funding for rural students. This is not because they are rural but because rural students are often in areas with highly dispersed populations. Thus whilst rural schools may receive greater levels of funding on a per-student basis compared to metropolitan schools, this is due to underlying differences in socio-economic status and population dispersion.

It is apparent that the school card measure used as a proxy for SES status does not ensure vertical equity of allocations to those most educationally disadvantaged students.

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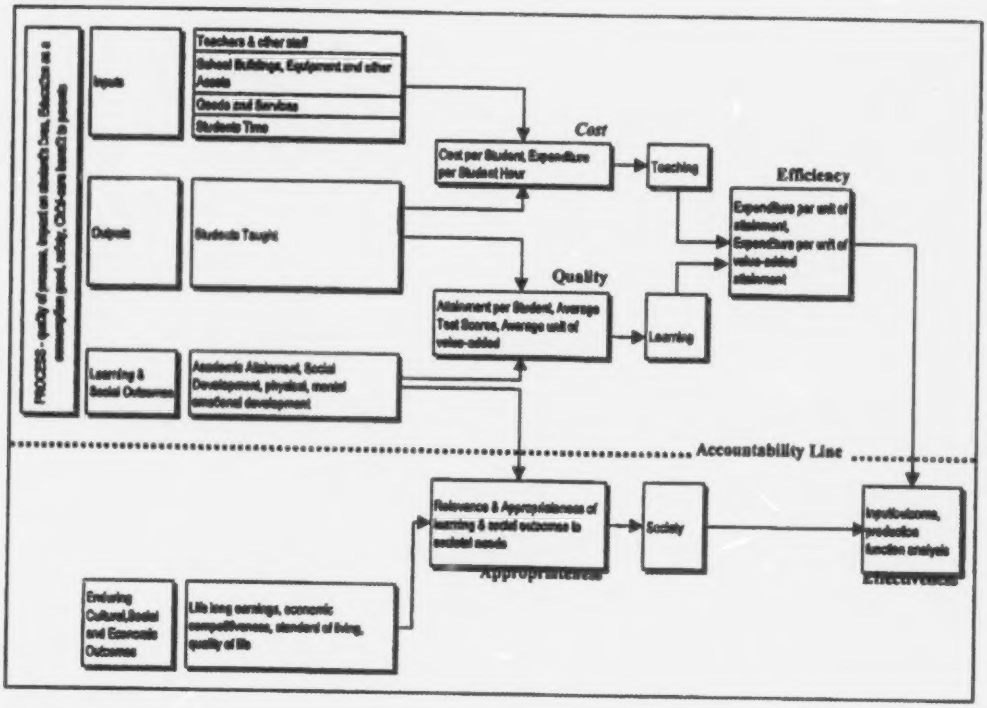
Figure 1 The Accountability Line


PROCESS - quality of process
Inputs
Teachers & other staff
School Buildings, Equipment and other Assets
Goods and Services
Students Time
Outputs
Students Taught
Learning & Social Outcomes
Academic Attainment, Social Development, physical, mental emotional development
Cost
Cost per Student, Expenditure per Student Hour
Teaching
Efficiency
Expenditure per unit of attainment, Expenditure per unit of value-added attainment
Quality
Attainment per Student, Average Test Scores, Average unit of value-added
Learning
Accountability Line
Relevance & Appropriateness of learning & social outcomes to societal needs
Appropriateness
Society
Input/outcome, production function analysis
Effectiveness
Enduring Cultural, Social and Economic Outcomes
Life long earnings, economic competitiveness, standard of living, quality of life

Source: Witham adapted from program logic model (Ince, 1993; Duckett, 1998). Appropriateness is below the line when it refers to being appropriate for the future needs of society.

Figure 2 Generic Output Funding Model

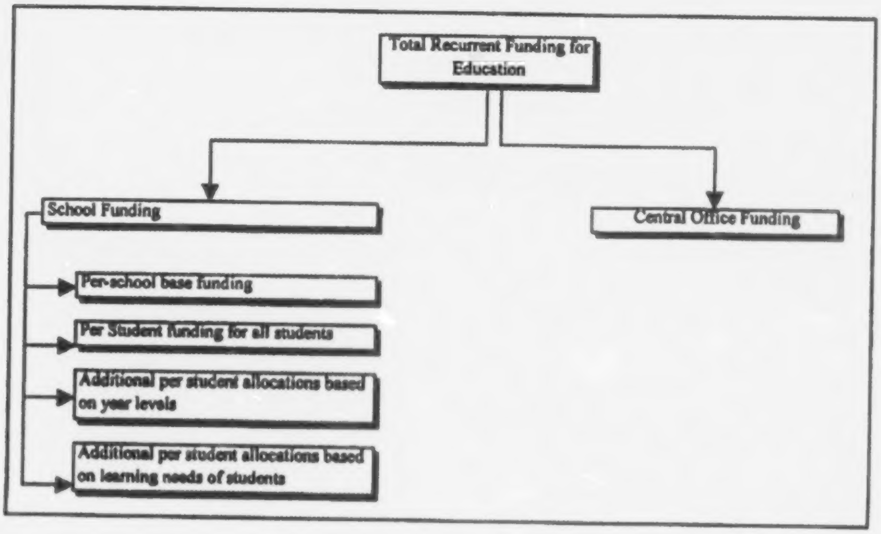

Total Recurrent Funding for Education
School Funding
Central Office Funding
Per-school base funding
Per Student funding for all students
Additional per student allocations based on year levels
Additional per student allocations based on learning needs of students

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Figure 3 Model of Implicit Funding Policy Analysis

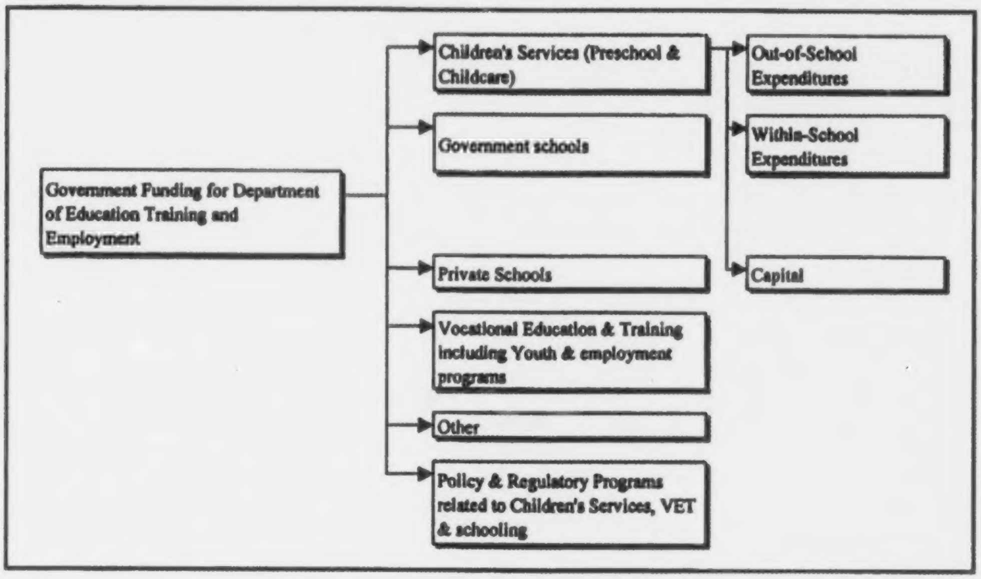
Government Funding for Department of Education Training and Employment
Children's Services (Preschool & Childcare)
Government schools
Private Schools
Vocational Education & Training including Youth & employment programs
Other
Policy & Regulatory Programs related to Children's Services, VET & schooling
Out-of-School Expenditures
Within-School Expenditures
Capital

Figure 4: Allocation of Resources to Major Output Classes in 1997/98

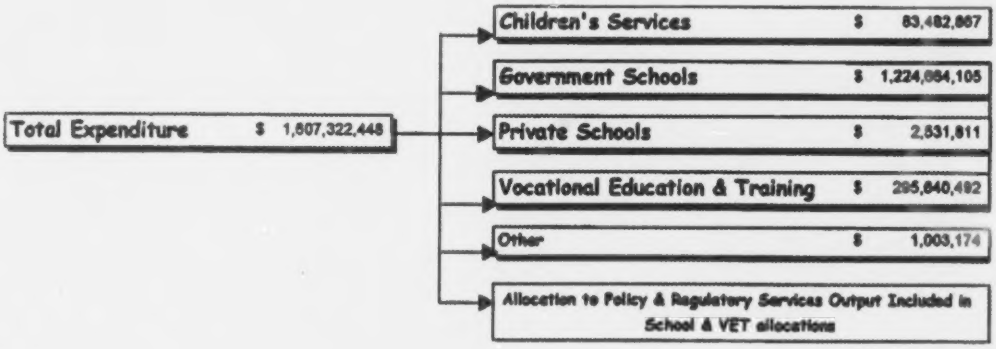
Total Expenditure $ 1,607,322,448
Children's Services $ 83,482,867
Government Schools $ 1,224,664,105
Private Schools $ 2,531,811
Vocational Education & Training $ 295,640,492
Other $ 1,003,174
Allocation to Policy & Regulatory Services Output Included in School & VET allocations

Figure 5: Multiple Regression Analysis of Actual Expenditures

Regression Statistics	
Multiple R	0.980474293
R Square	0.961329839
Adjusted R Square	0.960446671
Standard Error	260412.3853
Observations	628

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Figure 6: Multiple Regression Analysis of Actual Expenditures

ANOVA	*Degrees of freedom*	*SS*	*MS*	*F*	*Significance F*
Regression	14	1.03343E+15	7.38163E+13	1088.50114	0
Residual	613	4.15704E+13	67814610399		
Total	627	1.075E+15			

Figure 7: Implicit School Resource Allocation Formula

	Coefficients	*Standard Error*	*t Stat*	*P-value*
Intercept	$ 175,488	$23,129	7.59	0.00
Aboriginal	-$12,733	$78,291	- 0.16	0.87
Area & Combined	$ 467,868	$40,546	11.54	0.00
High	$ 183,288	$71,018	2.58	0.01
Junior Primary	-$36,371	$52,758	- 0.69	0.49
Special	$ 278,657	$87,235	3.19	0.00
R-2 Base	$3,089	$ 229	13.48	0.00
3 to 7 Base	$2,645	$ 133	19.92	0.00
8,9 & 10 Base	$3,320	$ 168	19.76	0.00
11 & 12 Base	$7,236	$ 309	23.39	0.00
Special Students in Mainstream Classes	$2,970	$1,578	1.88	0.06
ATSI	$5,229	$ 769	6.80	0.00
Poverty	$1,042	$ 305	3.41	0.00
Special Students in Special Classes etc.	$14,622	$1,521	9.62	0.00
NESB	$ 921	$ 277	3.33	0.00

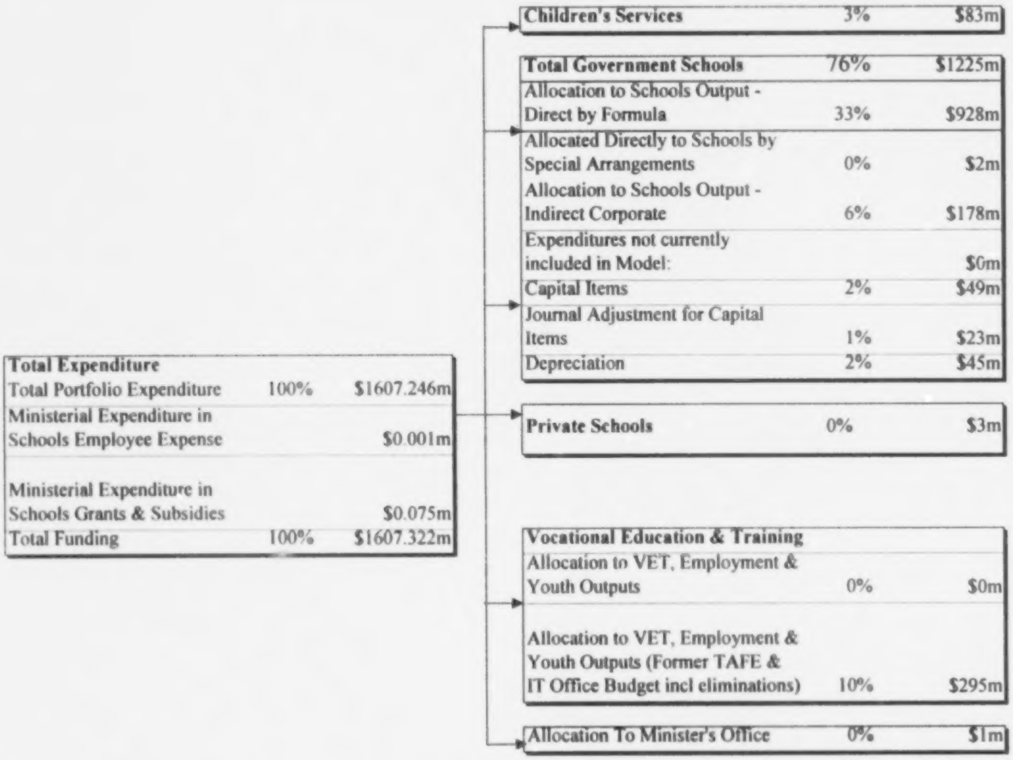
Figure 8: Re-Presentation of Implicit Funding Policy

Per School Funding - All Schools		$139,117
Additional Per School Funding	Primary	$36,371
	Aboriginal	$23,638
	Area & Combined	$504,239
	High	$219,659
	Junior Primary	$ -
	Special	$315,028
Per Student Funding - all Students		$2,645
Additional Per Student Funding	R to 2	$ 444
	3 to 7	$ -
	8,9 & 10	$ 675
	11 & 12	$4,592
	Special Students in Mainstream Classes	$ 326
Additional Equity Funding	Students from Non-English Speaking Backgrounds	$ 921
	Aboriginal Students	$5,229
	School Card Recipients	$1,042
	Special Students in Special Classes	$14,622

Figure 9: Out-of-school Expenditures 1997/98

Service	Total Budget Allocation
Expenditures Relating to Specific Schools - Special Arrangements	$1,583,730
Administration and Finance	$13,671,929
Facilities	$28,515,822
Other Corporate Support Services	$10,674,246
Curriculum Support including Aquatic, Outreach & Instrumental Music Services	$37,445,369
Aboriginal Education	$7,275,808
Special Education and Other Student Support	$25,996,515
Executive Management & Support (Includes Planning & Accountability)	$6,327,276
Human Resource Management Services	$21,824,030
Information Technology Services	$14,790,983
School Operations Central & District Support Services	$11,028,536
Total	$179,134,243

Figure 10: Summary Allocation of Resources to Outputs


Children's Services 3% $83m
Total Government Schools 76% $1225m
Allocation to Schools Output - Direct by Formula 33% $928m
Allocated Directly to Schools by Special Arrangements 0% $2m
Allocation to Schools Output - Indirect Corporate 6% $178m
Expenditures not currently included in Model: $0m
Capital Items 2% $49m
Journal Adjustment for Capital Items 1% $23m
Depreciation 2% $45m
Total Expenditure
Total Portfolio Expenditure 100% $1607.246m
Ministerial Expenditure in Schools Employee Expense $0.001m
Ministerial Expenditure in Schools Grants & Subsidies $0.075m
Total Funding 100% $1607.322m
Private Schools 0% $3m
Vocational Education & Training
Allocation to VET, Employment & Youth Outputs 0% $0m
Allocation to VET, Employment & Youth Outputs (Former TAFE & IT Office Budget incl eliminations) 10% $295m
Allocation To Minister's Office 0% $1m

The 76% of total resources allocated to reception to year 12 education is further disaggregated in figure 11, where both actual out-of-school expenditures and the implicit expenditures within schools from the regression analysis have been combined.

Figure 10 shows how total resources are allocated to the outputs of Government schooling, Vocational Education and Training and Children's Services (preschool and childcare).

Figure 11: Detailed Dissagregation of all Expenditures Relating to R-12 Education 1997/98

		Budget Allocation	Number of Students	Per Capita	In-School Expenditures
Allocated to ALL Schools on a "per-school" basis	13%	$154,428,206	177,191	$872	$154,428,206
Allocated to ALL students on a base per capita basis	37%	$458,094,412	177,191	$ 2,585	$458,094,412
Allocated to students on the basis of year of study	11%	$136,448,298	177,191	$770	$136,448,298
Allocated to Aboriginal Students	2%	$27,940,595	5,343	$ 5,229	$27,940,595
Spent Corporately on Behalf of Aboriginal Students	1%	$7,275,808	5,343	$ 1,362	
Allocated to Students with Disabilities	4%	$50,888,897	9,895	$ 5,143	$50,888,897
Spent Corporately on Behalf of Students with disabilities	2%	$25,996,515	9,895	$ 2,627	
Allocated to NESB Students	1%	$13,116,677	14,241	$921	$13,116,677
Allocated to Students who are school card recipients	6%	$70,647,596	67,807	$ 1,042	$70,647,596
Allocated to students of the Open Access College	1%	$7,063,331	829	$ 8,522	$7,063,331
Allocated to Students of the SA Secondary School of English	0%	$1,025,753	141	$ 7,301	$1,025,753
Allocated to Students of the SA Secondary School of English by special arrangement	0%	$1,073,902	141	$ 7,643	
Other Special Allocations to Particular Schools	0%	$ 509,828	5,498	$93	
Administration and Finance	1%	$13,671,929	177,191	$77	
Facilities	2%	$28,515,822	177,191	$161	
Other Corporate Support Services	1%	$10,674,246	177,191	$60	
Curriculum Support including Aquatic, Outreach & Instrumental Music Services	3%	$37,445,369	177,191	$211	
Executive Management & Support (Includes Planning & Accountability)	1%	$6,327,276	177,191	$36	
Human Resource Management Services	2%	$21,824,030	177,191	$123	
Information Technology Services	1%	$14,790,983	177,191	$83	
School Operations Central & District Support Services	1%	$11,028,536	177,191	$62	
Funding to Schools Which Closed at the end of 1997	1%	$8,252,703	177,191	$47	$8,252,703
Not Included in Model	10%	$117,623,392	Capital Expenditures		
Total Expenditure Allocated to Schools	100%	$1,224,664,105			$927,906,469

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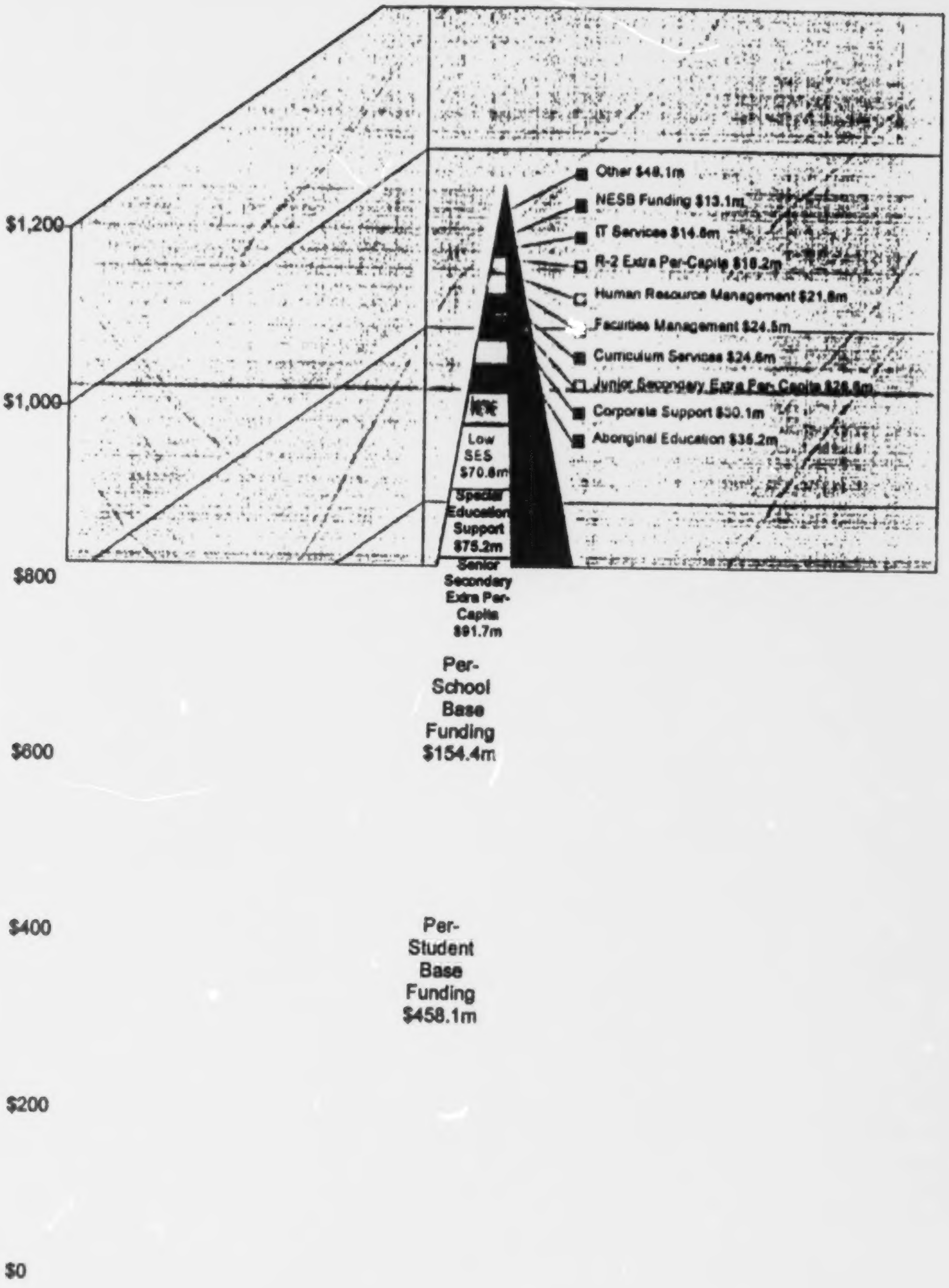

FIGURE 12: 1997/98 School Expenditure Pyramid

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Figure 13: Comparison between secondary year level funding relativities

Year Level	Implicit Corporate Resource Allocation	Case- Study Relativities All Schools	Case- Study Relativities Country Schools	Case- Study Relativities Metro Schools
8	100%	100%	100%	100%
9	100%	103%	107%	101%
10	100%	106%	112%	105%
11	218%	119%	140%	111%
12	218%	119%	140%	111%

Figure 14 Conceptual Diagram of Equity funding

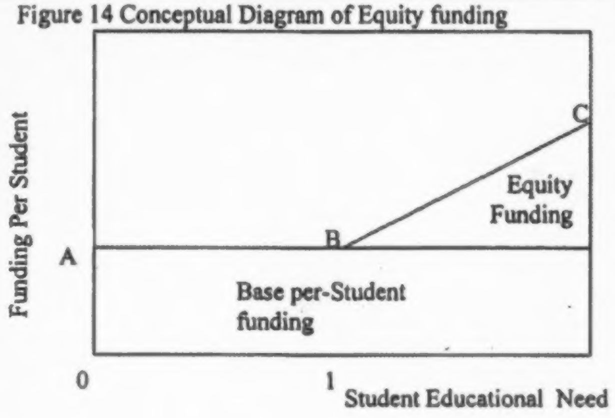
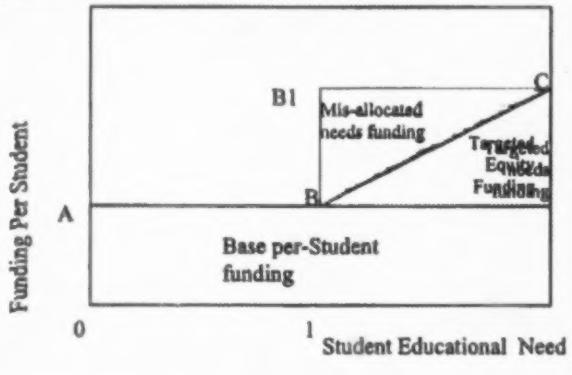

Funding Per Student
C
Equity Funding
B
A
Base per-Student funding
0
1
Student Educational Need

Figure 15 - The School Card Equity Mechanism


B1
C
Mis-allocated needs funding
Targeted Equity Funding
Targeted Needs Funding
B
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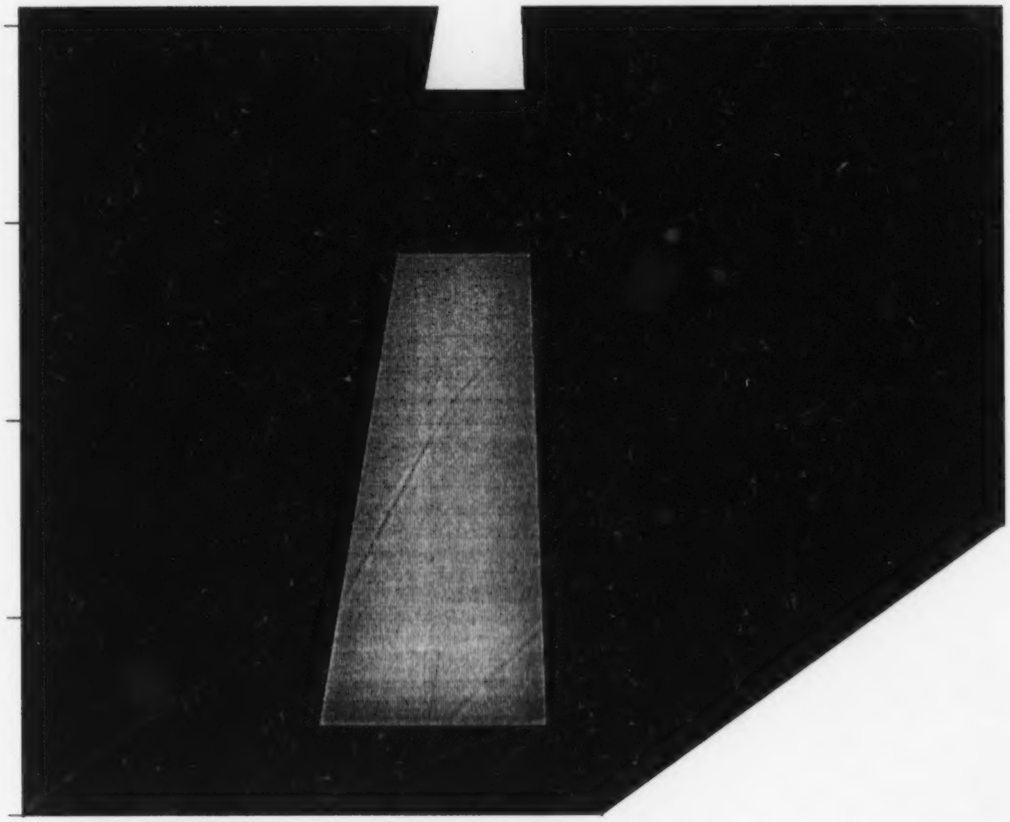

From The Bush To The City: Reversing An Australian Trend In Teacher Professional Development

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Background

1995 saw the start of a professional development program for rural Victorian teachers for which planning had begun in the previous year. The planners were a small group of educators who had first rendezvoused in August 1994 in the South Gippsland town of Leongatha. Here, they chose to call their program "Gourmet PD" - a name which symbolised their commitment to a high quality PD program for local teachers.

In its first year of operations Gourmet PD attracted 240 South Gippsland teachers (almost 50% of the district total) to its courses. These courses were organised by a partnership which comprised teachers, the state education ministry (the Directorate of School Education), the local Adult and Community Education Centre and Monash University's Faculty of Education. In its second year, there was rapid growth with 900 participants in three Gippsland education districts. In its third year (1997) growth continued, with over 2 100 teachers in some 250 (mainly state) schools participating in the Gourmet PD partnership across five education district (the entire Gippsland region). The 1999 participation rate was estimated at 4 100 across two regions and operating in seven education districts. At the time of writing (January 2000) it is anticipated that over 7 000 teachers will participate in the Year 2000's Gourmet PD (and offshoot) programs.

The surprising success of Gippsland Gourmet PD can be attributed to a variety of factors not least of these is the determination of that 1994 Leongatha Planning Group to provide rural solutions for rural problems - in the face of rural decline.

Rural decline and professional development for teachers

One of the most remarked upon features of Australian society in the 1990s has been the

gradual disenfranchisement of rural and regional communities, a circumstance which has, in part, produced a disaffected electorate and led to the growth of radical right-wing political groups such as Pauline Hanson's One Nation.

This disempowerment began, it could be argued, as a consequence of the urban bias of political and economic decision-makers (e.g. Lynn, 1989 and as commented on in Sher and Sher, 1994). Indeed, there is a view that, because of this kind of demographic/political relationship, rural voices are stifled by political/social, cultural, commercial and educational aspects of urban-rural relations.

Political/social relations and urban bias

Since urban voters make up a huge majority of electors, whichever political party is in power, Victorian state governments have tended to pander to their urban constituents at the expense of country regions. This has been noticeably true of the recent conservative coalition (1992-1999). For example, Victoria's Liberal/National State Premier Jeff Kennett initiated what was satirically called "a Casino-led recovery' which saw a special emphasis on a the opening of a major gambling venue (The Australian 9/5/1997), as well as the staging of major sporting events and the opening of major transport links in Melbourne. In this context, it is worthy of note that at that time, the only two independent state parliamentarians (199-99) were both from bush constituencies, one of whom, Susan Davies, was based in South Gippsland.

Cultural problems

Because rural infrastructure in Victoria is delicately balanced and poorly resourced, as it is in many states, there are major problems maintaining viable rural facilities. Schools, hospitals and social service offices are thinly scattered and are often given a low priority in governmental budget programs. Moreover, it is often difficult to attract professionals, especially teachers, to rural areas where there is an under-developed middle class culture. In this context, rural teachers say that "intellectual isolation is their most pressing professional concern" (Boylan, 1991).

Commercial culture and the collapse of infrastructure

Many commercial enterprises are completely closing down or are scaling down their rural offices because of alleged poor financial returns. This exodus from the bush reduces employment opportunities, results in a financial drain from the community, produces loss of community confidence and exacerbates the problem of declining infrastructure (Beal and Ralston, 1997). At the same time, the scaling down of local councils and the introduction of compulsory tendering has reduced the size of the local government workforce, reduced rural income and expenditure and, it is argued, severely reduced the level of service (Tesdorpf, 1996).

The educational issues

Although, more recently {1997}, the Victorian state ministry of education moved to plush offices at the expensively renovated Old Treasury Building, this Melbourne-based bureaucracy, operated throughout most of the 1990s from a landmark skyscraper office in central Melbourne known as the Rialto. To many teachers, this skyscraper became a symbol of an out-of-touch ministry apparently obsessed with applying economic rationalist (neo-liberal in North America) ideas in order to acquire what the government of the day considered to be sound economic and educational fundamentals. "The Rialto" soon became a emblematic phrase which represented insensitive, centralised administration which brooked no argument and which was characterised by crisis management, so much so that the School News, a ministry publication, became known in many staffrooms as "Pravda".

In contrast to urban luxury, the management of rural education is carried out via a series of small and understaffed offices in regional areas, a symbolic representation, it could be argued, of a department which has been accused of being intensely "urbo-centric" (Collingridge's phrase, 1990) in large and small matters. A typical, small scale example was the prevailing 1990s fashion for city-based breakfast policy and curriculum meetings which were customarily held in hotels in Melbourne and which commence at 8.00-8.30 am. These occasions had no meaning for bush teachers who may have lived and worked from 200 - 500 kilometres from that hotel, who were unable to attend and who were unable to participate: yet another example of the silencing of the rural voice.

It comes as no surprise therefore to find that professional development for rural teachers was sporadic, haphazard and often variable in quality, even before the Kennett 1992-99 government. This erratic approach to PD put Victorian rural teachers under great strain at a time when the pace of curriculum change in Victoria has been unremitting and frantic (Gough and Taylor, 1996).

To help deal with constant curriculum change, the new ministry (1992-97), adopted a policy based on strategic centralism (Townsend, 1996), consumer capture and educational accountability, moving towards a more controlled approach to PD and a much closer linking of PD activities to major state government curriculum initiatives. This approach was meant to replace much of the irregular PD which had taken place during the 1980s, and which had been, for many Victorian teachers, an activity of choice virtually fully-funded by the former Ministry of Education. Consequently, the allegedly ideological nature of that curriculum change alienated many teachers from the Victorian PD process, which they tended to see as part of a political campaign waged by what was considered to be an unashamedly politicised state ministry. The Kennett government having refused to deal with teacher unions at all, abolished 8,000 teaching positions and closed over 200 schools, many of them small rural schools which had once been the focus of many country settlements. Education policy in Victoria during the early-mid 90s seemed to be constant turmoil (Gough and Taylor, 1996), producing accusations of endemic crisis (The Age 4/11/1996) caused, it was suggested, by this continuous destabilisation of the curriculum. There occurred an alleged rise in stress and loss of morale amongst principals and teachers which seemed to be unprecedented and yet, at heart, which seemed to be ignored or denied by a ministry intent on self-justification (The Sunday Age 22/6/1997).

The federal educational background: the bush misses out again

The political changes wrought by the Kennett government took place in a wider climate of educational change instigated by the Federal (Labor) governments of Prime Minister Bob Hawke and Treasurer (later Prime Minister) Paul Keating. As part of the move to support a late 1980s attempt at a national curriculum at state and territory level, during the 1993-1995 triennium, the Federal Labor Government allocated $60 million for teacher professional development in the National Professional Development Program (NPDP). NPDP was supposed to provide resources over and above what the various states and territories were prepared to spend on local PD (National Professional Development Program Mid-term review of NPDP projects, 1995).

In an annual competition, the Canberra-based NPDP program organisers accepted bids from local state-based PD providers and the money was disbursed at state and territory level. Victoria had generally done quite well out of this program, gathering in about $4 million per annum, but there were two problems with NPDP.

In the first place, the Federal government accused state governments of propping up their state infrastructure with some of the NPDP money instead of using all of it to finance new projects. A second problem was that, in Victoria, most of the money went to state-level PD consortia which already had strong state government connections. For example, the Victorian (school) subject associations, which were partly financed by the state ministry and whose umbrella organisation was housed in a ministry building in Richmond, Melbourne, were major beneficiaries of NPDP grants. Indeed, a state ministry representative chaired the state NPDP selection meetings and only major PD providers who submitted a "state-wide" programs were accepted. This meant that regional areas such as Gippsland had to depend on metropolitan-based consortia who, whilst often espousing "state-wide" provision, in reality stayed in the metropolitan area and did little for rural and remote districts.

For example, the Mathematics Association of Victoria (MAV), normally an active and progressive organisation, was successful with its "Maths in Schools" project in 1994 but a year later, only two Gippsland schools (out of over two hundred and fifty) had benefited from this particular project.

Geography

To compound the problem of metropolitan bias, the Gippsland region had no major urban focus which would allow the area to develop its own concentrated PD activities. In contrast, most other Victorian regions have a major centre (e.g. Ballarat/Bendigo/Geelong/Warrnambool) but Gippsland, for historical reasons, had developed a string of small towns along the route of the Princes Highway (Warragul/Moe/Morwell/Traralgon/Sale/Bairnsdale) but none of these towns is significant enough to act as a major focus for any form of regional activity. This means that most Gippsland teachers who were keen to keep up with the latest issues in education, would only have the Melbourne option for any major professional development activity.

Thus, in a political climate where attitudes to the ministry were polarised amongst teaching staff and where educational change was regarded by many as a series of stress-inducing, politicised fads (The Age 22/11/1997). Government sponsored PD was quickly seen as, at worst, an attempt at indoctrination (The Sunday Age 15/6/1997) and, at best, a city-centred cosmetic exercise.

In this climate of distrust, whilst many rural teachers might indeed be alienated from the Rialto, they were however prepared to turn instead to their local education leaders as an alternative PD management system and they could also turn to their local university as a disinterested commentator and resource provider. That is how Gourmet PD began.

The starting point: South Gippsland

South Gippsland, is a small, picturesque district which serves a remote (by metropolitan standards) rural community of dairy farmers, arable farmers, some small farming enterprises (e.g. plant and tree nurseries and, for example, a lavender farm), viticulture and tourism (Wilson's Promontory and Philip Island). Leongatha, the small administrative and demographic capital of the district is a good two hours drive from central Melbourne.

Local teachers, over-stressed by the pace of top-down curriculum change 1992-94 which had no apparent rural context, wanted local, not metropolitan, provision and they made this quite clear through the voices of their PD Coordinators at the August planning meeting referred to in the introduction. Teachers explained that they were tired after a day's teaching and an exhausting journey into town to attend a frequently enervating PD workshop was costly in time, in energy, in petrol and, most importantly perhaps, costly to family harmony. Moreover, they wanted PD which addressed rural issues and which was not based upon metropolitan assumptions about resources and access to further PD provision.

Previously, South Gippsland teachers had been prepared to pay good money for local PD provision but it was often too difficult and too expensive to obtain. It was true that, on the travelling circuit, there were PD gurus who would travel from Melbourne to rural areas, but this was often only at a price (sometimes as much a $2,000 plus travel costs of $80 per hour for a one-off workshop). Moreover PD gurus would, as a rule, come (1) only if the participant numbers were there, (2) only when it suited the gurus and (3) only if each guru could perform his or her fixed routine. This "missionary attitude" to PD, allowed highly paid outsiders to drive in, accept large sums of money, perform their routine and drive off again, leaving behind a group of by now impoverished but highly excited teachers with nowhere to go except back to their individual schools and back to the same old routines. This was not what the teachers of South Gippsland wanted.

The solution: grassroots decisions

The South Gippsland PD Working Party (of three) met several times in late 1994 to discuss the problem. What was needed, it was decided, was a program which placed control of rural PD in the hands of rural teachers. For too long, it was felt, teachers in the bush had been forced to accept metropolitan solutions to rural problems.

The course design, therefore, was based on several key points:

- *Teacher Demand* Each course or set of courses started with local teacher demand not with ministry priorities and not with PD guru availability. Accordingly, all teachers in the district were surveyed and their responses fed into calculations about what might be offered. This was a participation and empowerment issue.
- *Local Provision* Each course is offered locally. To allow maximum participation and maximum attendance, courses were offered within the locality at suitably comfortable venues (not schools initially - for political reasons - too close to a seemingly heavily politicised ministry). They were also offered at an appropriate time (usually shortly after school or early evening - not the weekends which are regarded as a sacrosanct recreational break in Australia) and with substantial refreshments provided. This was more than just a convenience issue, it was also a status issue.

Local PD would need to operate in a comfortable and welcoming environment.

- *High Quality* For too long, it had been asserted by many non-metropolitan observers, rural teachers had been fobbed off with second best. In the South Gippsland program, the organisers paid for the very best PD providers that money could buy. To make their intentions plain, the term "Gourmet PD" was adopted (Gippsland is on of Australia's major cheese, fruit and wine producing areas and is often referred to as a "Gourmet Region"). Although initially regarded as a peculiar, and even eccentric, choice of name, the Gourmet tag was a political statement which soon became not only accepted but also sought-after by PD providers who saw selection for Gourmet PD as a status symbol.
- *School-based research* An important component of the process is the carrying back into schools. ideas and activities generated by the PD workshops. Here, teachers are encouraged to adopt an action research approach and actually try out some of the initiatives to which they had recently been introduced.
- *University credit* Many teachers had successfully completed PD programs which had been intensive and onerous but they often found themselves repeating the same kind of work when they enrolled in postgraduate studies at a university faculty of education. A major aim of the Gourmet PD was to introduce a system which would allow all participants the opportunity to gain credit for PD studies. This was a recognition of the value of practitioner-research and an attempt to build teacher self-confidence in reflective practice.

To carry out these aims, early in 1995, the planning team arranged for the hire of a Gourmet PD Manager, a local high school teacher (Terry Harrington) who brought to the project outstanding qualities which included strong commitment, remarkable professional knowledge and a readiness to listen and learn. The program was to be funded, in the first instance, partly by local DoE funds and partly by a Rialto DoE grant. Later (1996-98), partner schools were to be asked to contribute 25% of the PD budgets towards the program.

Program design

The program design, as originally conceived, comprised a 3-stage process. The guidelines were as follows:

- *Stage One: The workshop* The sequence of activities involved full participation commences with a workshop or series of workshops (a minimum 14 hours contact time later reduced to 12 hours). Workshop leaders were asked to outline recommend follow-up activities and references for subsequent Stages. A list of participants (professional names, addresses and phone numbers only) who wish to progress through Stages One-Three was circulated to relevant participants who registered for Stages One-Three. The names of those who want to go on were given to a Stage Two Coordinator who was usually a local curriculum consultant.
- *Stage Two: dissemination and practitioner research* Participants returned to their school community and arranged for dissemination of ideas and activities discussed and outlined in Stage One workshops. Dissemination could be arranged through the following agencies and activities: Staff forum/ staff meetings/departmental or subject meetings/ subject teaching association meetings/school council meetings/parent evenings/ local radio and local television appearances/local newspaper article(s)/professional magazine or journal article(s). Research/ school-based activities stems from issues raised in Stage One and results may be disseminated via agencies and activities outlined above. Final results of research/classroom activities can be written up for the optional Stage Three (see below). Dissemination/research/school activities were to be documented by participants and validated by a senior member of staff on a university supplied pro forma and submitted at Stage Three. Notional time was set at approximately 12-14 hours of Stage One group activities plus approximately 90-100 hours of study and other activity time including practitioner research. These times/activities were to be approached in a flexible and professional manner. As long as participants demonstrated a *bona fide* professional manner in carrying out these activities, there was normally no problem with university assessment. Stage Two involved the establishment of voluntary, focussed study groups. Each group was normally formed from workshop members who have decided to register for credit. Groups could be single school groups whilst others may spread across a number of schools. Inter-school groups were encouraged. Groups selected a Convenor and a Recorder and notified the District Stage Two Coordinator of their existence. The Convenor then arranged for a series of sessions where specific issues were discussed. Participants and topics were noted by the Recorder and submitted at Stage Three on a university pro forma.
- *Stage Three: university credit and project submission* The final stage involved the submission of a major project. The subject of the project and the proposed methodology were to be outlined on one sheet of A4 paper (with participant contact details) and sent, for initial comment, to the Professional Development Institute (PDI) Monash prior to commencement of the report/project. Maximum word length of the proposed project was 3000 words. If the word length was substantially below this maximum (2000 words or less) participants needed to provide evidence of equivalent substitute written/oral tasks which would be offered in place of the extra 1000 (or so) words. To meet teacher needs, variations on the project format have been

introduced more recently. These include a reflective practice journal. If the final project constituted a substantial departure from a formal written paper (eg a school production or a substantial school charter contribution) this should be fully documented in the original proposal. Projects were examined by PDI Monash staff on a pass/fail/resubmit basis.

If a participants are successful in all three stages they were (in the main) awarded non-specified credit for one 6 point subject at postgraduate level (the equivalent of one-eighth of a year's fulltime work). Some minor variations have been introduced recently to make the system more flexible. It is important to note that credit for professional development courses could only be granted up to five years after completion of each program. Successful participants were awarded a Faculty Professional Certificate. These Certificates may then be submitted in an application for credit to other Monash and non-Monash courses. Attendance requirements at workshop and at Stage Two sessions were 75% minimum. Any problems in this area were to be fully documented with medical certificates.

The partnership model

Gourmet PD was based on partnership. The four equal partners in the process were:

- *The Ministry (The Directorate of School Education)* The Ministry, via the Rialto and the regional office, provided policy support, funding, access to schools, the time and services of several key players in the organisation of Gourmet PD, principally Ian Todd (a District Liaison Principal and inspirational local leader) and the Project Manager Terry Harrington plus the fractional services of curriculum consultants to assist with planning and organisation. In 1994-5, Gourmet PD was seen by the Rialto as a small rural project (one of three small PD projects - the two others were urban) of no particular significance. Accordingly, despite putting in $120,000 in cash and probably half as much again in kind over a three year period, between 1994 and 1996 inclusive, only three visits were made to attend management meetings and to check on progress in faraway Gippsland by Rialto staff who were already heavily distracted by state-wide curriculum reform implementation. In the end, this arrangement worked to Gourmet PD's advantage, allowing the program to grow until it reached a stage in its development where, by necessity, its success led to automatic support from the Rialto.
- *The Community Education Centre (the South Gippsland Adult and Community Education Centre or SGACE).* SGACE, normally funded by federal project money, had acquired substantial expertise in running a variety of adult education programs, in organising venues and speakers as well as in financing these kinds of adult education programs. Gourmet PD was a bonus for SGACE because, at a time when adult education centres were under threat from federal cuts, the Gourmet project would go down on the books as a major activity and a small source of income for SGACE. Moreover, Ned Dennis, the SGACE manager, had very strong educational principles and expertise which, in a constructive and positive fashion, informed management committee meetings during planning and implementation.
- *The Community* South Gippsland is unlike other Gippsland districts in many ways. It has a relaxed ethos which was progressive, comfortable and highly appealing to the many urban refugees who settled in the area during the 1970s and 1980s. Its schools too have always had a particular atmosphere which combined informality with academic and social success. This culture stemmed from the democratic nature of local education organisations, the most significant of which was the South Gippsland District Education Committee (SGDEC), an active and highly consultative group of school officials and local community members. It was the SGDEC who sponsored that first Leongatha PD meeting, provided initial funding and gave continuing support to Gourmet PD. Local teachers and principals were also fully involved in the process of setting up Gourmet PD. Because of this process of careful and genuine consultation, felt that ownership of Gourmet PD resided in South Gippsland.
- *Monash University Faculty of Education* Because Gourmet PD was about teacher-initiated PD, it was important that the university was seen as a partner not as an owner or leader - this despite several queries from the Rialto about why Monash was not a more dominant force within the program. The author's contribution was based on his experience as a course designer - with a background in both school and adult education, as a professional development coordinator and as the Australian Credit Transfer Authority national specialist in credit transfer and recognition of prior learning in primary and secondary education (Taylor,1996 and Taylor & Clemans 2000). As the faculty representative, the author attended committee meetings, helped design the Three Stage strategy, devised credit transfer strategies and acted as a liaison with the world of the university, a society which, to many teachers, is a mysterious, closed and secretive environment. However, it was important that the Monash Faculty did not push forward its own staff as PD providers since there was some scepticism about the capability of long-serving university lecturers in a world of constantly changing curriculum initiatives. Gourmet PD would choose its PD providers from any university or from any non-university consultancy or organisation.

Program implementation

The Leongatha Working Party's view was that an organising or steering committee be established which would guide and manage the process of creating the Gourmet PD programs in 1995. The initial Steering Committee consisted of the newly appointed Program Manager Terry Harrington, Ned Dennis of SGACE, Lisa Alexander a Curriculum Consultant, Ian Todd the South Gippsland District Liaison Principal and the author as a Monash University representative. During the second half of 1994 (North American and European readers should be aware that the Australian school 4-term year runs from late January to late December), the Program Manager collated the survey of teacher PD needs. With the assistance of the Steering Committee, he then publicised the program, arranged for workshop leaders to be booked, organised venues and dates and produced the Gourmet PD booklet which was distributed to every teacher in the District.
In Term 2 1995 (April). Gourmet PD began.

Evaluative report findings and commentary on developments 1995-97

The first evaluation, of the pioneering South Gippsland scheme, was conducted by Heather Kelly of the Monash Centre for Research in Health, Education and Social Science (CHESS) in late 1995 (Kelly, 1995). The strengths of the program, as identified by the evaluation, included:

- the collaborative, consultative and comprehensive nature of the organising committee which was composed of representatives of various educational sectors who worked harmoniously to ensure that the program remained focussed at the grassroots level.
- the workshops and study groups which were flexible and dynamic in content and delivery and which met teacher needs by addressing current curriculum initiatives in a way that was seen by teachers to be professionally and personally valuable
- the early identification of a need for ongoing professional development which had led to the employment of a dedicated program manager

Points for further development, which could be seen as potential weaknesses, included recommendations that:

- a more intensive marketing strategy be employed to ensure the economic sustainability of the program
- the organising committee be realistic about the strengths and pitfalls of geographical expansion of the program

The evaluation findings indicated that teacher involvement in Gourmet PD was unusually high. In an education district with approximately 500 staff, 43% of all (not just DoE) South Gippsland teachers attended Gourmet PD activities, an unheard of proportion for voluntary PD anywhere in Victoria. 25 study groups were formed but only a small number of teachers (8) proceeded to stage 3. CHESS also reported that 82% of respondents said that their curriculum knowledge had been consolidated or improved. At the same time, 73% said that had become more confident in using the new ministerial curriculum documents (syllabuses and curriculum support materials) and 80% of all participants said that they would enrol in Gourmet PD in the following year, if it were offered. A final comment from one participant was that "other (Education) Districts should sit up and take notice".

And indeed, the other districts did. In 1996, West Gippsland, encouraged by the success of Leongatha-based programs, joined South Gippsland in joint management (by Steering Committee) of a bigger Gourmet program. Halfway through the first semester, East Gippsland too, borrowing from South Gippsland's 1995 experiences, set up its own Gourmet program with its own Steering Committee.

The funding for the 1996 programs had been aided by two new developments. In the first place, the ministry, gratified by the return on its investment in the first Gourmet program, promised a further $40,000 seeding money for West and South Gippsland (East Gippsland, as latecomers, had to operate temporarily on a modified user-pays basis). The second development, which aided all districts eventually, was the ministry decision to relinquish central control of school PD funds and allocate $240 per capita (now approximately $270) to each school for PD activities. The spending of this sum was to be decided at the school level and not by the Rialto. This placed a great deal of PD power in the hands of local Principals and PD Coordinators but the Gourmet Management Team had, from the first, operated a strategy which involved developing good public relations with all school principals whilst, simultaneously, fostering good operational links with PD Coordinators. This groundwork was to bear fruit in 1996 when all participating schools dedicated 25% of their total PD budget to the new Gourmet PD program.

The 1996 program saw partner schools in West, South and East Gippsland auspice 48 courses with 1005 participants. Although no external evaluation was conducted, internal surveys revealed that, in 1996, there was a similar satisfaction rate to the 1995 returns.

Gourmet goes regional and beyond in 1997

Almost inevitably, the other two Gippsland regions (Latrobe Valley and Central Gippsland) fell in step for the 1997 program, What had started out as a small-scale pilot program in 1994 now was spread across the entire region, with a fulltime Regional Manager and a Regional Management Committee aided by District Steering Committees. The budget for the 1997 program was close to $350,000 (including a further seeding grant of $40 000 from the by now flabbergasted ministry) and for 1998. The 1997 program saw 95 courses involving 2123 participants. At the same time, a pilot Gourmet program opened in an adjoining semi-metropolitan region of the Mornington Peninsula with over 1000 potential participants and a budget of $100 000. The Peninsula program, which began in 1998, was currently operating in 1999 with 1500 participants in two education districts (August 1999).

Modifications 1997-99

As the program grew in scale and as the planners grew in experience, it became quite clear that the focus for progressive professional development should shift much more to Stage 2 which was now regarded as the engine room of curriculum support and of successful curriculum change.

But whilst it was simple enough (all things being equal) to provide the best workshop leaders, it was less easy to support and monitor Stage 2. In 1995 there had been about 20 South Gippsland Study Groups (out of 240 participants) and these Groups had looked after a variety of projects from school charter development to primary-secondary school transition program development to counselling and welfare research. In 1996 however, the Study Groups were gradually phased out as it became clear that some participants viewed them as semi-compulsory and something of an unwanted commitment. The Study Groups were gradually replaced by District-based Facilitators who acted a links with the university and who would establish Study Groups - if and when required.

If the known level of activity at Stage 2 was relatively strong, the level of activity at Stage 3, even allowing for the relatively minor role of university credit transfer in the process, was disappointing. In 1995 about 6-7 % of all participants went on to Stage 3 and, as the program has grown, this percentage has probably (based on preliminary observations - see below) declined to about 3%.

In an attempt to be more flexible in meeting teacher needs, Monash introduced (in 1997) three forms of assessment for credit. Currently they are:
Option 1 - a short piece of assessment of about 1500 words which reflects on a Stage 2 activity and places it in a broader theoretical context - 4 points credit
Option 2 - a Reflective Practice Journal of not more than 5000 words with an additional 1500 word summative essay - 6 points credit
Option 3 - the original 3000 word essay - 6 points credit
Each of these options should be preceded by a project proposal (maximum 500 words) which is evaluated by a Monash staff member and returned either as accepted or for additional work. The proposal wordlength is then included in the total wordlength.

Second Evaluative study of Gippsland Gourmet PD (1998)

Monash's Faculty of Education supported an evaluative survey of Gourmet PD in the Gippsland region (it is also operating in the Peninsula {Frankston} region in 1998). The Chief Investigator was the author. Co-researcher and statistical specialist was Ms Arda Cunningham.

Approximately 1500 survey forms were distributed to Gourmet participants in the autumn of 1998. Surveys were to be completed only by those who participated 1995-97 and each respondent was asked to complete only one questionnaire. What this means is that whilst large numbers of forms were sent out to catch as many respondents as possible, a much Eventually, 377 forms were returned to be examined for this report. The survey used a 5 point Likert scale with 2.5 representing a median response and anything above that represented an increasingly positive response. Of the sample, 227 were primary teachers and 139 were secondary teachers. 11 were a kindergarten teachers or special education teachers. The ratio of female: male respondents was 3:1. The majority (68%) of all respondents had 4 year pre-service qualifications with 1 at 2 years, 4 at 3 years, 5 at 5 years (e.g Post Graduate Diploma) and 3 with Masters coursework degrees. The median age of the sample was 42.14 - slightly younger than the median age of all Victorian teachers (which - in 1998 - was 46). Notably, only 14% of the sample were in their 20s, a reflection of the decline in teacher recruitment in Victoria in the 1990s.

There was no indication that enthusiasm for Gourmet PD was related to age or career-stage. For example, one of the youngest in the sample (21-25) had completed 5 Gourmet workshops in 2 years and one of the oldest (56-60) had completed 10! Most respondents were reluctant to use Gourmet credit to assist in undertaking further study for the following reasons:

- they were too busy at school "Time is very valuable. I would need to study by Distance Ed." Female-secondary age 41/45- 4 year trained - 3 Gourmets)
- they were worried about the cost of the Higher Education Contribution Scheme (HECS) especially mature age teachers (e.g "I can't afford this (HECS) for both my children and my self (sic) so they come first!!" Female - secondary - age 36/40 - 4 year trained - 4 Gourmets)
- whilst the credit transfer takeup rate was very low, there was no overall view that university courses were irrelevant to professional or personal needs but there was strong evidence that teachers considered university postgraduate qualifications irrelevant to DoE career pathways (e.g. "What point would there be to having yet another degree. They certainly won't pay me more" Female - primary- age 41/45 - 4 year trained - 5 Gourmets)
- whilst there was no majority opinion that university study was professionally irrelevant, faculties of education received mixed reviews. The single focus

> of most criticism was faculty staff lack of awareness of current educational issues (e.g. "(we need) Academic staff who (are) currently teaching (in schools) or just left, not people who haven't taught for 20 years". Female - secondary - age 20/25 - 4 year trained - 2 Gourmets).

73 respondents had not yet completed any Stage One workshops and hence were excluded from the analysis. The remaining respondents completed a total of 960 Stage One workshops. 47% completed one or two workshops, 48% from three to seven workshops, and the remaining 5% completed in excess of seven workshops.

The impact of Gourmet PD

This project set out to examine the impact of Gourmet PD in the three specific topics:

- teacher effectiveness
- student learning
- attitudes to further (university) study

For the purpose of this article, only the results concerning the first two topics will be discussed. The findings (Likert scale 1–5) were:

(1) Teacher Effectivenss A very positive response was noted with improvement in curriculum knowledge and skills at 3. 25 and improved ability to deal with the demands of the profession at 3.42. Most responses to questions regarding classroom effectiveness, organisational skills, counselling skills and understanding of educational systems and structures fell within similar ranges of satisfaction (3.3 to 3.55). Teachers felt more able to deal with curriculum innovation, they were more confident about coping with the stresses and strains of teaching and were more able to deal confidently with parents.

(2) Improvement in Student Learning The results indicated an overall positive response to the question "I have observed that Gourmet PD has significantly improved student learning in my classes" with responses. There was a significant increase in positive responses from those who had completed 2 or more workshops (from 2.84 to 3.66). Primary school teachers felt more positive about their experiences in this context than did secondary school teachers.

In the area of improving their skills and knowledge, the three specific areas teachers felt were most impacted by Gourmet PD were teaching and communication skills, cooperation with other teachers, and counselling skills. Respondents also reported that Gourmet PD assisted in them meet the demands of teaching mostly through enabling them to collaborate more effectively with colleagues and deal more effectively with the school management team. They also reported that Gourmet PD programs allowed them to be more confident in dealing with the stresses and strains of teaching. Furthermore, student learning was improved by Gourmet PD through the development of more effective learning practices and a positive attitude to learning, and through the enhancement of subject skills and knowledge.

Overall, teachers who had completed the greater number of workshops expressed significantly more confidence about improvements in student learning than did those who had attended 2 or fewer workshops.

It might be expected that teachers who attended more than two workshops would agree more strongly that Gourmet PD had led to improvement in their skills and knowledge. Gourmet PD might also be expected to help them meet the demands of the profession and improve student learning in their classes - if we assume that these teachers were a self-selecting group. On the other hand the large numbers of teachers attending more than two workshops suggests that the positive effects of Gourmet PD extended beyond any small group of dedicated and committed professionals to the much larger body of teachers who, nearing the end of their careers and (arguably) demoralised by rapid educational change in the 1990s, used Gourmet PD as a collegially stabilising influence on classroom practice.

Conclusion

Gourmet PD has been a startling success, particularly at time of rural recession (se for example The Age 20th August 1999). Indeed, the achievements of the program belie the nature of the deficit model of rural education. Whilst some rural school programs may struggle at times of economic need, other rural school programs can succeed if they identify, adopt and take advantage of their very rurality- as has Gourmet PD (see for example Capper, 1993). Rural society, with its informal networks, its pragmatic nature and its capacity for flexibility has proved an ideal nursery for a professional development program which quite easily translates into a more impersonal urban setting.

Gourmet PD's success is almost entirely a consequence of the following factors which have strong rural elements:

- the program was developed by rural planners specifically to meet rural needs
- the program established core operating principles, one of which was to remain flexible in the face of changing rural needs by continually questioning its policies and procedures
- because it was a rural initiative, the program was virtually ignored by urban education planners until it had become so established that metropolitan involvement (or, as some critics would say, interference) was no longer an option
- the program emphasised continuing client and customer consultation
- Gourmet PD hired a creative and energetic Program Manager (Terry Harrington) who is a local teacher with

high levels of local credibility and highly developed listening and organisational skills

- the local, regional DoE office gave strong support to the program
- Monash University Faculty of Education's rural campus remained, together with the DoE and the two Gippsland Centres for Adult and Community Education, a partner in, not the owner of, the program
- Gourmet PD is a self-managed program which provides high-quality PD at roughly half the cost of other equivalent PD programs

What started in Leongatha on a cold and rainy August evening in 1994 has now become the crown in the jewel of Victorian teacher professional development and is currently a preferred model for PD in both rural and in urban settings, a clear example of the power of the voices from the bush.

Postscript

On Friday 6th August 1999, five years after the initial meeting which set up Gourmet PD, the Program Manager Terry Harrington convened a meeting of the Gourmet "Clans" at Leongatha to ascertain future directions for the program. This at a time when the topdown (and far from successful) Victorian Professional Development Network launched by the DoE in 1998 had been based very loosely on Gourmet model and when the DoE had set up a copycat (also topdown)local PD group in eastern Melbourne named "Premium PD". Moreover, Gourmet groups are springing up in the nearby Dandenong region and in the northern Victorian Goulburn region.

The Clans concluded that Gourmet PD should proceed as a grassroots model - but one that needed to take into account school-based PD needs as well as individual teacher needs. Another significant conclusion was that Stages One to Three should be merged into a single stage - to encourage teachers to press on to the tertiary credit option. Finally, it was concluded that Gourmet PD whilst retaining its original vision, should continue to adapt and improvise to meet changing circumstances.

At the time of writing (January 1999) over 7 000 teachers are engaged in Gourmet or Gourmet-based PD activity.

PS. In the Australian spring of 1999 (September/October), the Kennett government called a state election but, to the astonishment of all except bush-dwellers, was thrown out of office. The election campaign had been seen as a foregone conclusion by the Liberal/National coalition – but the government fell foul of a cataclysmic rural backlash. A Labor government swept to power with the assistance of three rural independent candidates, two of whom were from Gippsland. By then, the Liberal/National Commonwealth Government in Canberra had appointed a Minister for Regional Affairs.

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Mentorship & the Development of Rural Leadership

Elaine M. Borden-Ballard & Glenn Wm. Sinclair, Canada

Abstract

The study examined findings in recent literature on *mentoring* and related this to the experience of a twenty-one year mentoring relationship. This led to two conclusions:

- Validation that this experience was itself reflective of current trends and expectations of both informal and formal mentoring programs.
- There is a need to develop more formal recognition of mentoring as a tool or avenue within a rural administrator's professional development program.

The challenge however, is to find the way by which this entire activity can be incorporated into the academic accreditation process in a manner similar to that utilized by the proponents of *prior learning assessment* (PLA).

Introduction

The world of rural leadership is challenged to describe or design opportunities for staff development that do not require or rely upon post-secondary training. Communities in the hinterland oft-times wonder why, after having obtained a university degree, a teacher or a social worker or a business manager, upon being hired, immediately wants to know what are the provisions for professional development. For those individuals wishing to move into roles of leadership and/or administration, the challenge is even greater: how to obtain the necessary skills while trying to carry out present tasks, combined with gaining formal accreditation through the appropriate post-secondary programs.

To many, with their roots increasingly comfortable in the rural environment, too much emphasis may be placed on the formal coursework and not enough on *hands on* practical training. Yet how does the potential leader find a solution that is more *grassroots*? How can working or potential administrators accomplish their goals related to daily leadership and still successfully add to their skill base so that they are recognized as credible, *promotable* executive candidates?

Here is the second part of our response to the challenge of how two professionals connected through mentoring to create a leadership development program for one rural administrator.

Why did this journey get started? And, how did it then keep going?

Rationale

There are two key participants in this study: (i) the leader at the centre of this study (as **protege**), and (ii) the leader who, first as a professor and then as a professional colleague, provided the advice and guidance (as **mentor**). Both believe that mentorship is a professional development tool whose time has come. It is a more realistic approach by which to acquire and/or pass on the practical skills needed to meet the demands placed on developing leaders by staff members and the communities they serve. They ventured down this road in part as a result of an independent compatibility analysis relatively early in their relationship. The results of simultaneous Myers-Briggs assessments showed useful compatibility, validating an earlier effective professor/student learning experience. The M/B process itself is now a recommended procedure out of the work of Irvin & McDaniel (1994) when attempting to establish effective mentorship pairings.

This idea of mentorship is not new. Crow & Matthews (1998) borrowing from Clawson (1980) remind us of the story from Homer: When Odysseus left on his journey to fight in the Trojan War, he left his son Telemachus, in the care of his loyal friend, Mentor. Mentor not only guided and educated Telemachus, he attended to every facet of his life, that is, social, intellectual and physical. According to Crow & Matthews, quoting from Kay (1990), Mentor not only provided encouragement and assistance to Telemachus, he taught Telemachus to think and act for himself.

The foresight of Odysseus using an older experienced person to guide and train an inexperienced person has not been lost throughout history and today. More and more, it is seen as an essential tool to assist the newcomer upon his or her entry into a profession (Fleming, 1991). *Mentor* has come to mean someone with experience who teachers and guides someone with less experience. The French word *protege*, meaning one protected by someone with experience and influence, is closely connected to the English word *mentor*. A mentor is slightly removed from the situation in which the *protege* is involved, looking on and encouraging and providing advice. Sullivan (1992) describes a mentor as being a screen, an avenue, a wise counsellor, a support and a role model.

Renihan (1998) suggests that *mentorship*, along with recruitment & induction, continuing professional development, professional affiliation and other related themes, is an important component of leadership.

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Moreover, recent literature provides further evidence that mentoring can, and ought to be given more attention in the area of professional development.
Our mentor, from his experience as a consultant to government and business, believes more attention should be paid to *field-based* leadership development. It has been his experience over the past thirty years, that there are too many unique requirements within individual assignments and there is too much diversity in the basic talent of potential leadership candidates, to rely primarily (if not solely) on the academic community to train and accredit the future executive talent needed to operate our rural institutions. With the ever-increasing shift towards more technology, components of the economy will move into rural environments thereby countering somewhat, the impacts of the amalgamation/ consolidation of farms. As Dr. David McKinnon (1999) has noted, the ethics of *caring* and *doing public good* may be best delivered in the rural setting. As he further argued, caring teachers don't just teach – they enter into the lives of students; therefore this may help us see that living in rural Canada is NOT a deficit.

Cottage industries and home-based businesses are on the rise. Such people oft-times want a less hectic community life. James Montgomery (1999) of Malaspina University College suggests that it's often the case that the rural context is more fun, closer to the action and therefore more relevant. Too often rural is talked about as a place that is missing stuff (i.e. the deficiency model), yet many rural people describe rural in positive terms. He further posits that we should replace the *rural as deficit* concept with *rural as different*. By moving away from the urban scene, they will place new pressures on the suburban and rural institutions that provide public services to the community and its citizens. To maintain responsiveness to any re-shaping of the community's make-up, the local leaders, even if fully accredited, will require frequent re-training or up-grading to maintain currency in skill sets and/or keep a sense of leading-edge managerial thinking. Furthermore, the nature of the daily tasks probably won't permit the leaders to return to the academic classroom.

Montgomery (1999) provides key findings that can assist the establishment of mentoring as a viable professional development tool: *rural professionals are a homogeneous group* and *shared similar sentiments in every discussion of rural preparation, recruiting, retention, and living and working in a rural community*. Moreover, *rurality is valued*, so it is worthwhile for organizations to try new methods to keep recruits in their area. He further discovered that rural professionals primarily don't go to rural communities for money, nor do they leave because of it. So what are the largest number of complaints? Ease of access to higher education, especially for professional development! And there were even serious requests for some new form(s) of training to be made available.

Another opportunity to consider the advantage(s) of mentoring.

The Journey: Elaine's Story as the Mentee/Protégé

> *During the summer of 1979, I enrolled in a University of Saskatchewan course entitled Educational Administration 323b. I knew that likely I would be one of the oldest students as I had stayed home to have my three children before embarking on my teaching career. My supposition held true and so when I walked into the class and saw the numbers of young students, I walked to the back and took a seat, almost as an observer. People were filing in and among them was a tall fellow wearing brown corduroy pants and a yellow shirt, sporting long hair and a beard. He had the audacity to sit at the prof's desk, after which he leaned back and folded his hands over his stomach and watched. We waited a period of several minutes, as courteous students should do, then he stood up and walked to the chalkboard and wrote* ***Dr. Glenn Sinclair****. I thought,* ***Oh no! This is the prof?!!***
>
> *It didn't take long to figure out that this was a different sort of bird. For one thing, he had no intention of teaching to the course outline. No - he was going to teach a course in ethics in administration because that was what he had just completed his doctoral dissertation on. He even offered to divide the class into two sections and instruct us at different times in order to maximize time spent with each student. He interviewed each student in order to get to know them better and to let them know what would be expected of them as a member of his class.*
>
> *A few days into the class, Dr. Sinc started off on a topic which, in hindsight, was ground-breaking, but to which I took exception at the time, this being child custody issues. I must have been slightly fired up as I was usually a* ***nonconfrontational*** *sort; but, I approached him at the break and asked if we could discuss the issue. He complied and we had a good debate, but at its conclusion, each felt a shared and amicable understanding.*
>
> *Throughout the class, we all became very close and carried on numerous social activities at the acreage on which my family lived. Glenn and I kept in touch regularly when he returned to Vancouver.*
>
> *At this time I was teaching Grade Three (3) in a small school and had* ***no*** *administrative ambitions. Through the next couple of years,*

Glenn encouraged me to continue to take courses toward an Education degree and to consider administration. Eventually the Board of Education opened up a vice-principalship at my school and without telling Glenn I applied for, and got, the job. I still remember calling his office at the Department of Indian Affairs, as he now was working in Regina, and leaving a message for Dr. Sinclair to call the Vice-Principal at Osler School. Coincidentally, I answered his returned call, and when he asked to speak to the Vice-Principal. I said, ***You're speaking to her!!***

Over the course of the next twenty years, we carried on our individual career paths, mine somewhat more stationary than his as I remained in the same school division in Saskatchewan, moving from the vice-principalship to a principalship in a variety of different school situations. However, during the summers especially, but also at other times, we did have opportunities to collaborate and work together on a variety of projects. We did some curriculum writing as part of a team, conducted teacher training classes in British Columbia at two different aboriginal-owned independent (private) schools, supplied leadership and leadership training in several church settings, took a couple of classes together at the B.C. Justice Institute and, with all of this, had the pleasure of getting to know each other's immediate and extended families and friends.

In looking back over the twenty plus (20+) years of our ***mentorship*** *relationship, I find that I learned to be a more confident person in tasks which I undertook, became more forward-looking in my attitudes toward work, experienced leaps of professional growth, and became more willing to take on challenges. As a principal who has operated without a vice-principal and often feeling isolated, I relied on Glenn's advice, experience and expertise on many occasions. I have even become confident enough of my own skills and knowledge sets, that I now take time to mentor others or at least share insights and suggestions with team mates in contexts well beyond the principal/teacher supervisory setting. At times I model after Glenn, but often I adapt to new requirements or amalgamate his advice with my own experiences. I have been grateful for his encouragement, support and unfailing friendship.*

The Validation

Now, how does this journey demonstrate the value of mentoring as a way to improve the skill and knowledge base of the leader (from *potentiality* to *actuality*)?

We believe there are at least eleven components to the establishment of our effective working mentorship.

Establishing the Relationship

Initially the relationship developed informally: as Coley's research pointed out: Regular contact (was) important (to be effective) and there was a need for flexibility. Furthermore due to the structure of the protege's work environment, the mentor needed to be outside the system (Coley, 1996). As Burke & McKeen (1997) have discovered, the mentorship started early in the protege's career, was not actively encouraged by her organization, and (she) definitely (was) not targeted for special attention. While not formal, the mentorship experience did manage to overcome Fleming's (1991) concern that informal programs may not help *women assume administrative positions* or her reference to Gray's need for *readily accessible opportunities for capable people to be mentored.* To further allay Fleming's concerns, there was neither a *great risk factor* due to the trusting relationship established over the years nor was there a problem of a *sexual connotation.*

Contrary to Crow & Matthews (1998), it also did not seem to matter that the mentor matching was not a result of critical consideration by both her district and herself. In fact, having an informal mentor is supported by Pollock (1995) in part because there is no assignment by the organization. It is harder to say whether the relationship was established according to social exchange theory (Cook 1987, Thibault & Kelly 1959) or through *signals about the likely success of those whom they choose to mentor* (Olian, Carroll & Giannantonio 1993).

This has not precluded different mentors also participating in the protege's development, particularly in mid-career transitions and different socialization stages (Crow & Matthews 1998). In the final analysis, Crow & Matthews summary insight says it best:

> *significant mentor relationships form because of happenstance... particularly where they have a high regard for one another. Mentor relationships form best when mentors & proteges share a similar style of thinking (Parkay 1988). Roche (1979) found that many mentor relationships in the business world developed into lengthy friendships... The most effective mentorships are those in which the partners are allowed to choose each other freely (Zey 1985).*

Communications Process

The importance of effective communications is apparent in almost every leadership development program. Mentoring is no different. One early step is creating comfort between the parties. Again, as Crow & Matthews (1998) determined, *mentors can help proteges relieve their anxiety by finding a comfort zone.* Fleming (1991) stresses *the mentor must give relevant information to the mentee so that learning takes place in less time than it would if the person had to get the information through the normal process... other general functions are to be a listener, a confidant, a motivator and a communicator for the protege.*

Another key was the appreciation by the mentor, once the protege moved into a full administrative role, of the diminished opportunity to carry out *thoughtful analysis of practices or decisions* (Crow & Matthews, 1998). Also critical, the protege was dealing with a myriad of decisions during her work day, with little time to prepare and reflect. Having a mentor allowed time to dissect and discuss some of the specific incidents in after-hours contexts thereby strengthening the protege's knowledge and skill sets without disrupting the on-site decision-making process.

Asking for assistance was not *perceived as ineffective* (Crow & Matthews, 1998). We agree *that mid-career administrators who ask for mentoring show strength instead of weakness*; the focus at all times *is attaining dynamic leadership* (Crow & Matthews, 1998).

Distance was not a negative factor as Crow & Matthews (1998) found: *although proximity is a factor to consider in mentor-protege matches, modern technology has reduced distances...*

In the establishment of the communication process, one step was omitted according to Coley's findings. There was no joint collaboration between the mentor and the protege's supervisor(s) to *address the protege's development needs* (Coley, 1999). Communication was straightforward and frequent between the mentor and the protege solely.

Setting the Goals

The goals of mentoring are at the core and guide the rest of the mentoring process (Crow & Matthews, 1998). The role of the mentor was established as *one who supports, and facilitates resource sharing, problem solving, and feedback separate from the evaluation process* (Robbins, 1999). And, *a completely laissez-faire...outlook towards mentoring (was) clearly not proposed* (Hawkey, 1998). Nor was the mentor to be evaluator (Cohn & Sweeney, 1992). A prime goal was to overcome any sense of isolation to prevent *what Lortie refers to as* ***privitism*** *in which there is a lack of sharing or talking about experiences with students, teaching and learning* (Hauserman, 1993). Another aim was to provide some shielding *from the harmful effects of making wrong decisions, yet (permitting) the protege (to learn) from the experience, to handle similar future situations* (Crow & Matthews, 1998).

Kram's (1985) two functions of mentoring - career (learning the ropes, etc.) and psychosocial (development of the individual in his or her social environment) were addressed. It was in the mentoring context that a vital aspect of social environment was most effectively looked after. A reason for having potential leaders go to university for training is that almost all universities argue that it is there wherein a sense of community is built. But does that community parallel the one to be encountered in the rural context? Most universities are mini-cities in and of themselves. Mentoring is context-specific and in this instance it was definitely rural focussed and rural based.

A degree of reciprocity was also sought; *through collaborative and reflective discussions mentors expand their understanding of leadership (and) mentors gain a sense of renewed enthusiasm for the profession* (Crow & Matthews, 1998).

Determining the Skills

Throughout the protege's journey several career moves occurred. Each time there were more issues than concern about location. Again as Crow & Matthews (1998) noted from Hall (1986) there was *a change in self-image and self-esteem*; and, as they further found in Crow, Levine & Nager (1990), oft-times *a move from perceiving oneself as a master to perceiving oneself as a novice.*

It was at times such as these that attention became less goal-oriented and more skill determination, those (i) wanted and (ii) needed.

(i) The protege wanted more skills in leadership, which Coley (1986) argues can be readily obtained through effective mentorship. Mentoring also helped increase job satisfaction and decreased work alienation (Burke & McKeen, 1997). It was definitely an individual process; in fact, *more a process of individuation than socialization* (Crow & Matthews, 1998). And as Crow & Matthews also point out, there was *heightened sense of career ambiguity (and) heightened awareness of longer-term dimensions of career effectiveness.*

As the protege developed the various skill sets she wanted, she also demonstrated a keen interest in exploring various other careers as side bars (Hall, 1980). These included forays into the private sector where business opportunities enabled her to acquire additional skills and new contacts.

(ii) If the protege was going to succeed on the promotional ladder, the mentor (being outside the organization and at some physical distance) needed to encourage her to move beyond his direct influence. Inspiring the creative side of the protege, there emerged a willingness to adopt *ideas from others* (Crow & Matthews, 1998). And through political and business associations of her own, plus introductions to university colleagues by the mentor, she made a variety of other connections. *As acquaintances are made with others in the profession, visibility opportunities increase* (Crow & Matthews, 1998). The value mentoring can have re enhancing the usefulness of the formal university experience also became apparent.

The mentor provided cautionary advice about effective ways to be successful on campus by connecting the college and professional lives in as harmonious a fashion as possible given the nature of the rural community the protege worked in versus the context of the urban university. This relates to benefits Crow & Matthews (1998) assign to the mentoring process: *protection from damaging situations (and) opportunities for challenging and risk-taking activities.*

The physical distance factor also necessitated that some of the more immediate socialization issues were better addressed through the protege's own emerging networks and among her teaching peers. Crow & Matthews (1998) suggest this can be a challenge for the mentor; but, in this instance other sources of guidance within and nearer the system were more effective at helping determine and develop the needed skill sets.

As the protege continued to excel at new administrative tasks and assignments, a heightened sense of respect was gained from the new sets of peers (fellow administrators). Through nominations (of the protege) to committees or in direct conversations, these peers themselves encouraged the protege *to be more dynamic and reflective* (Crow & Matthews, 1998) which counterbalanced any job constraints which might have otherwise inhibited such professional development.

Again all this took place in a rural context that university courses would have had great difficulty replicating.

Time Commitment

Time for this process has never been an issue and the relationship is now well into its 21st year. In essence, even the evaluation component (Gaskill, 1993) has only come to the fore as a result of developing this paper. Pollock (1995) describes three models that outline timing patterns (Phillips, 1977; Missirian, 1982; Kram, 1983). None seem to apply directly, perhaps because of the informality by which the relationship started and continues.

Such issues as older-younger, and expert-novice (Crow & Matthews, 1998) have not been significant factors due to the longevity of the relationship. Perhaps, however, the lack of a time factor may illustrate one advantage for more formalization in the mentoring processes. Crow & Matthews (1998) note that *time is a critical feature of socialization and therefore of mentoring. The sequence or lack of sequence of learning that occurs is pivotal to reaching the goals of mentoring.* If mentoring was established in a format parallel to PLA (prior learning assessment), time would be scrutinized more appropriately. As Crow & Matthews (1998) further espoused *a major feature of our map or model of socialization includes time - as an organizer of mentoring experiences and as an influence on mentoring content, methods and goals.*

Broadening the Horizons (of the Protege)

The process met the concerns of Hubbard & Robinson (1998) that the loneliness and confusion experienced by upwardly mobile women be alleviated and that the activities be a win-win situation. The mentoring also started early in the protege's career and to some extent, due to the connections of the mentor the protege experienced *an aura of power and upward mobility* (Hopson, 1995). The relationship was reciprocal (Olian et al, 1993) and it did extend the protege's network to others in her profession (Fleming, 1991), to other professions and to other experiences (Kram 1985, Kram & Isabella 1985, Noe 1988b, Olian et al 1986). In particular, by connecting the protege to an educational leader in another province, a form of collegial assistance was introduced (Schuman cited in Hauserman, 1993).

(i) Perhaps a formalized mentoring program would have established more diverse relationships (Gaskill, 1993). Formalization would have ensured participation by those superiors responsible for *the protege's job responsibilities and career development* (Coley, 1996).

(ii)The connections to other professions did reflect Burke and McKeen findings (1997) *females reported receiving significantly more psychosocial benefits from the mentoring relationship than did males.* Introductions to other professions helped *open doors not previously available* (Crow & Matthews, 1998). Mentoring provided an avenue of experience not readily available in campus-based practicums and/or seminars (Crow & Matthews, 1998).

(iii) But the horizons were probably broadened most through introductions to other experiences. Working on projects in another province, within the aboriginal community and among a diversity of professional talent helped address Hauserman's concern that *the sharing of experiences by itself is not enough* (1993). He goes on to say, *what is needed is someone who knows and understands the situation; someone who can relate to the stresses, problems, concerns, failures and successes.*

Additional Benefits to Protégé

There were times when the protege actually taught the mentor, i.e. Coley's role reversal (1996). However, there were less quantitative and qualitative measurements which Coley also recommended. A more formal process would provide for this and help maintain a tracking and recording system.

The protege never had any obvious problem(s) leaving an old role which is somewhat at variance to Crow & Matthews (1998). Again, a formal mentor program might better track why that is. For this particular informal mentorship, non-issues were allowed to remain non-issues. According to Crow & Matthews (1998), several types of evaluation should be used. Throughout the past twenty years, the protege has managed to handle all four of Nicholson's (1984) adjustment modes (replication, absorption, determination and exploration) constructively and usefully. And the protege learned the key things Fleming (1991) identified in the Bova & Phillips survey (1984): *risk-taking behaviour, communication skills, survival in the organization, skills of their profession, respect for people, setting high standards and not compromising them, how to be a good listener, how to get along with all kinds of people, leadership qualities and what it means to be a professional.*

Types/Extent(s) of Interventions

Hawkey (1998) found that *as they taught, so they mentored.* In many ways the informality of the teaching/learning style/experience where the protege and mentor first met, continued throughout the mentorship. On the other hand the mentor did not expect recognition from the protege's successes, contrary to Olian et al (1993). Hauserman (1993) has found that where there is potential for isolation, a mentor can be a positive intervention. In the rural context wherein this mentorship occurred, this certainly was a possibility. The nature of interventions related in varying degrees to all four identified by Crow & Matthews (1998): knowledge, skills, behaviours and values. As well the mentor intervened to help *guide the protege in professional, career and psychosocial development.*

In many situations, the protege, in readjusting to a new context would, in turn, intervene in at least the thinking process of the mentor by the questions asked and/or the perceptions the new roles generated. There was a mutual adaptability along with increased self-awareness that resulted from the various interventions that occurred.

Should the process be more formalized it would doubtless be beneficial to add specific training and simulations to ensure mentors practice good intervention strategies. This would be preferable to simply hoping the mentor-protege relationship was sufficiently strong to accept intervention in stride.

Leadership vs. Team-playing

A major advantage mentoring has over college course work is the flexibility in the term of the relationship (i.e. can last many years, Coley 1996) combined with the continuing opportunity of both mentor and protege to move between leadership and team-mate roles. The latter can be further strengthened through development of a support network (Hauserman, 1993). An attitude of lifelong learning is created among those who are involved in mentoring programs (Daresh & Playko, 1993). The protege oft-times is in the best position to determine which of the two roles is most appropriate or effective (Crow & Matthews, 1998). But in any case *a mentor has to be believable to be of assistance* (Hawkey, 1998).

Linkages and Connections

While the relationship will no doubt continue, there is now as much reverse mentoring as anything else. The protege has developed a wide network with a diversity of linkages and many connections. The protege now has the opportunity through these linkages to help address Fleming's (1991) concern: *now that women are applying for jobs that were previously inaccessible to them, it is very important that they have access to mentoring to help them.* The protege has expanded her efforts at collaboration, sharing ideas and trying mentoring approaches to issues within her primary profession. She is a central figure within the professional development planning for her peers in educational administration. She is a source of advice and mentorship to program specialists and classroom teachers. She is, in many ways, the epitome of Hauserman's (1993) leader of peer support. Her journey is having new waves of impact.

The results of the journey are sufficiently positive that the case can be made for broader support of Fleming's (1991) recommendation: *it is important that the education system* *endorse formal organized programs in their systems to give women and minorities an equal chance at having a mentor... If some one is not willing to take the risk to mentor women and minorities, then the path for women and minorities will remain blocked.* Making this process formal and accredited would give it standing and therefore improve credibility while addressing non-professional problems. As Fleming (1991) notes *formal mentoring programs are increasing but not fast enough.* By bringing accreditation into the scenario, perhaps there would be a surge in implementation.

Through the protege's development of expanded linkages, the benefits of her leadership extend into the rural communities she has served. Thus this network itself increases the value of the initial investment, particularly for those committed to the rural context. The protege continues to make inter-role and intra-role transitions (Crow & Matthews, 1998). Only now, because of her position, these are more visible and serve as role models for others starting or changing their career journeys. The linkages afford her the opportunity to share her thoughts about these. Establishing a formalized program would encourage others to make sure they gained access to her thoughts and those of others like her. In turn, as these people gain perspective on her insights they themselves become more adept at using *others' interpretations, local interpretative schemes, predispositions and purposes, and past experiences* (Louis, 1980).

The Mentoring Leadership and Resource Network (Rowley, 1999) presents itself as one of the potential vehicles by which the accreditation process is pursued and attained; especially, since its first purpose is *to provide an organizational vehicle for a mentoring initiative.*

Benefits to the Organization(s)

Reflecting back over the twenty plus (20+) years wherein the protege has remained within one major rural school division, many benefits, and potential benefits, to the organization itself are evident. And these exist without prior investment by the organization.

•Theories of career development indicate that in later stages of their organizational careers after successfully advancing, senior employees are looking to leave a legacy to their institution or profession. One way of accomplishing that is through the development of junior proteges (Olian et al, 1993).

•Mentors should be recognized as a way of developing and realizing administrative aspirations by junior administrators (Hubbard & Robinson, 1998).

•Mentoring is powerful... Mentors offer many forms of assistance... Mentors also serve as problem solvers... Mentors also observe and give feedback... (Robbins, 1999).

•The number of women in the work force has increased sharply during the past century. If projections are accurate, this trend will continue well into the next century... However, even though a large number of women are joining the work force each year, few are moving into upper level positions, including academic administration... If female and male educators receive equal education and preparation for professional positions in educational administration, as evidenced by their equal representation in faculty ranks, why do men appear to move more easily up the career ladder than women? (Hubbard & Robinson, 1998).

Mentoring programs have the potential to

•improve the job performance of both mentor and protege;

•reduce turnover in early career stages;

•develop sufficient talented manager(s) to replace those about to retire;

•maintain high levels of managerial contributions through middle age and beyond;

•prepare individuals for roles of organizational leadership. (Burke & McKeen, 1989).

•The impetus for program development stems primarily from a concern for the high levels of turnover in lower managerial ranks... Mentoring programs can also provide a way to increase top management's awareness of developmental activities taking place and ensures that the executive hierarchy has a role in developing future talent in the organization (Gaskill, 1993).

•Challenging and respecting the subordinate seems to form the foundation of mentor-protege relationships and this foundation is not subsequently taken for granted (Pollock, 1995).

More generally the organization can hope to realize a number of advantages including: the transference of organizational knowledge effectively and efficiently from one generation to another; bridging the gap between experienced and non-experienced leaders in terms of organizational goals, values, expectations, culture and work performance; demonstrating concern for those entering into the new culture (Shelton & Herman, 1993). Fleming (1991) considers mentoring *the most powerful training tool and the one that is most likely to guarantee mobility within the organization.*

More particularly, Fleming (1991) contends that mentoring is especially valuable for improving the organization's use of its women staff: *women need mentors if more of them are to move into administrative positions.* Furthermore,

> *Mentors can provide women with the essential informal training, which cannot be duplicated by formal courses, workshops, and training manuals. It is here that the mentor serves as tutor to the technical aspects and unwritten rules of the organization; for example, the expected as opposed to required working*

habits; acceptable dress and mannerisms; and acceptable behaviour within given situations.

In addition, the *protege* and the *mentor* validate the benefits of mentoring which the organization could now extend to many more on its staff, by committing openly to the process..

For the ***proteges***, benefits include:

- someone to rely upon for support and encouragement
- assistance in *learning the ropes*
- tips on how to deal with others
- advice on how to handle particular situations
- introductions which may be helpful to furthering one's career

Crow & Matthews (1998) have identified other returns which may be more subtle:

- exposure to new ideas and creativity: when proteges encounter different experiences, new ideas for practice emerge; generally, people who have mentors become *more creatively productive.*
- protection from damaging situations: mentors can shield the protege from potentially damaging situations by forewarning them about what lies ahead.
- opportunities for challenging and risk-taking activities: in challenging situations, the mentor can provide the support for the proteges to take a risk without endangering their careers; this still allows for the protege to learn and gain the experience required for similar situations in the future.
- increased confidence and competence: mentors can provide support, praise and encouragement and guide the protege to an understanding of what could be done to improve the decision-making the next time.
- improved reflection: *Working with mentors allows proteges to reflect on their practices. As they talk with mentors, they become more insightful about their actions. Kanter (1977) suggested that individuals gain **reflective power** from their mentors.*

There is little in the literature which describes the benefits to the ***mentor*** but again Crow & Matthews (1998) provide some insights which suggest a real value for the organization if it encouraged more internal staff to become mentors:

- Mentors gain a renewed enthusiasm for their own career. By being involved, they avoid being isolated as well as reviewing their own growth potential and leadership qualities.
- Mentors gain many new insights. This may come in the form of new technical or computer skills. It may also come in the form of a greater understanding of what it means to be a leader.
- Mentors can gain opportunities for career change or advancement through their involvement with the protege and the mentoring process.
- Mentors gain validation of their importance and the importance of their work as a mentor.
- Mentors gain long-lasting and meaningful friendships.

To date all five points have been benefits that this mentor has experienced.

There are others that also can gain from this mentoring process. Crow & Matthews (1998) prefer to name these as ***passengers*** and include university faculty, district administrators, teachers, students, family and friends. In addition it is anticipated that this study will also identify fellow workers (including even those in direct supervisory roles to the protege plus those being supervised by the protege) as benefiting passengers.

Again Crow & Matthews (1998) provide some initial indicators of potential benefits:

- Administrators with mentoring programs in their districts have more capable leaders. Daresh & Playko (1993) found that leaders in the school districts with mentoring programs tended to be more energized by the mentoring process.
- A community of learners becomes more apparent. An attitude of lifelong learning is created among those who are involved in mentoring programs (Daresh & Playko, 1993).
- District administrators gain better recruits and candidates for administrative positions. Visibility and exposure allow more individuals to emerge as successful candidates for administrative positions (Nash & Treffinger, 1993).
- University faculty have a means to link theory and practice. Associations between internship experiences and course subject matter occur more frequently than when no internship is in place.
- Teachers and students gain the opportunity to work with more dynamic leaders. Principals who are involved with others in a collegial and reflective mentoring are more collaborative and interested in improving teaching and learning.
- Family and friends benefit from proteges learning to balance multiple roles. Through mentoring, proteges tend to have a clearer perception of the roles they play with school, family and friends.

And, In Conclusion

Fiddler (1997) illustrates how professionals learn utilizing the learning cycle created by Kolb (1974), based on the work of Kurt Lewin. He states that the Kolb cycle *suggests the need for help in planning experience and* *reviewing and theorising [sic] afterwards. This is a role which a mentor could perform.* Fiddler further states that the cycle suggests some characteristics required by a mentor including two key areas:

(i) The mentor should understand *the process of reflective practice* and be able to facilitate this by understanding the types of experiences needed and the theoretical basis which supports the reflective process.

(ii) The second area is the need for the mentor to possess *appropriate behavioural skills to work successfully with other adults.*

These sentiments are echoed by Wilkin (1993) who states that with regards to mentoring, *the postmodern perspective invites a reassessment of the status and role of disciplinary theory and also of public practical theory vis-a-vis the status and role of that theory which is the outcome of personal reflection.* Hawkey (1998) in her article on mentor pedagogy speaks of the evolution of models of mentoring *from the apprenticeship and competency model, through to the reflective model.*

Longitudinal studies are needed to further our understanding of the developmental course of mentor-protege relationships (Pollock, 1995; Burke & McKeen, 1997). But the increasing popularity of *job-embedded learning* (which includes mentoring and) *is learning by doing, reflecting on the experience, and then generating and sharing new insight and learning with ourself and others* (Wood & McQuarrie 1999) suggests there is already a strong belief in leadership circles of the imminent value of such relationships. This type of connectedness helps *participants develop trust and the ability to give and receive non-judgmental feedback* (Wood & McQuarrie 1999).

And we cannot simply expect the universities to alter their current programs to address all these needs and opportunities. Their present internship programs generally are regarded as *one of the weaker aspects of (their) preparation programs* (Crow & Matthews, 1998). *As Sparks and Hirsch (1997) have noted, job-embedded learning is a new paradigm for staff development that will help shape professional learning in the 21st century* (Woods & McQuarrie 1999). It actually gives us a new perspective on inservice learning and training, *It presents educators with an alternative to workshop-based professional development and other more traditional inservice learning programs. It changes our thinking about work from completing tasks to viewing daily experiences as opportunities to learn* (Wood & McQuarrie 1999).

Expectation(s)

As this process unfolds it is expected that, in addition to the direct results of the research itself, certain outcomes will emerge.

Boards of Trustees and/or Directors will be encouraged to look at this as an alternate way to acknowledge and evaluate their administrators.

  - Staff developers (will) give more attention to finding ways to promote this kind of learning (Wood & McQuarrie 1999).
  - The professional associations and/or organizations to which leaders belong will consider having the process formalized as an alternative to sending people back to graduate studies for certification.
- Political and professional leaders will examine the possibilities for requiring re-structuring of present systems in order to establish a process that is more appropriate for leadership development and accreditation than peer-tutoring or sector teams.
- Consideration will be given to developing mentoring as a variant on the theme of *prior learning assessment* (PLA) but directed towards leaders (instead of simply for adult learners looking for college credit).

As this is all part of the larger context of career development, it will benefit from some more thinking **outside the box**. There needs some serious discussions between the PLA thinkers and the designers of professional training programs. For example, the five step helping process that Vinge (1999) notes is used by career development facilitators and could be easily adapted to PLA, also parallels the processes discussed within this mentoring relationship (including: relationship building, goal setting, interventions, etc.). Vinge further suggests that what is needed to make this all work is more rigorous attention to determining: what has been learned? and what skills have been acquired (and retained)? It would not be a difficult exercise to combine her work along with that of Geoff Peruniak of Athabasca University (noted by Vinge at a presentation at NATCON 1998) to create a potential matrix to help further formalize mentoring towards a moral acceptable and accreditable structure and format, And, as Montgomery (1999) has discovered, some willingness to recognize the real differences (and opportunities) that exist outside the metropolitan urban centres in our society.

As Crow & Matthews draw from George Bernard Shaw:

> *The reasonable man [sic] adapts himself to the world, the unreasonable one persists in trying to adapt the world to himself. Therefore all progress depends on the unreasonable man [sic] (George Bernard Shaw, quoted in Nicholson (1984), pp. 174-175).*

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KEYNOTE ADDRESS

"Connecting Rural School Reform and Rural Child Advocacy

Jonathan P. Sher, USA

Greetings to the brave, the few and the hearty who stayed until the bittersweet end. I will start my remarks with a thank you. It's a thank you to Jim Montgomery, as the organizer of this conference; To Mike, as his dean who supported him strongly, and, to all the other Malaspina staff members and students who have made this event possible.

I very rarely go to conferences anymore. perhaps that's because I'm very rarely invited to conferences anymore! Be that as it may, I wanted to come to this one, and it has turned out in many ways to be an even better experience than I was hoping for and anticipating. First-rate international conferences like this don't happen by accident, and so, before the afternoon peters away, I'd like to ask everybody to join me in thanking our conference host for making this experience possible. [wild and prolonged applause ensued]

I know this is a conference about rural education and development. but, i would prefer to start by sharing a tale with you from long ago and far away. I want to tell you the story about an evil king who wanted to get rid of all the Jews in his kingdom, not just the rural ones, but all the Jews. Persecuting the Jews, even then, was not a new idea. however, this king came up with a novel method get rid of them. He decided that he personally would challenge a representative from the Jewish community to a debate – in fact, a debate in sign language! The King Proclaimed: "I'm going to make three signs and if your representative can read those signs accurately and answer them correctly, your people can stay and live here in peace in my kingdom. But, if the responses are wrong, all the Jews must leave my kingdom immediately and permanently. As you can imagine, this caused enormous upset in the Jewish community. They asked themselves, "What are we going to do?" For two days, they discussed and fussed and still didn't have a plan.

Finally, Yonkel, the little man who ran the chicken shop said: " enough! I'll debate the King and it will turn out okay. Trust me."

So, it's the day of the debate. There's a platform in the center of the royal court and the King and Yonkel are there. The King throws out his hand with his fingers outstretched. In response, Yonkel holds up one fist. The King says, "That is amazing. You got it right." Then, the King quickly points two fingers directly at Yonkel's face. Yonkel reacts by swiftly lifting one finger in front of his own nose. The King again is astonished and states: "You've read my second sign correctly and you've answered it correctly." Finally, the King reaches into his royal cloak and pulls out a piece of old, moldy cheese. Yonkel looks at him, shrugs, reaches into his pocket. And pulls out an egg. The King says, " I don't believe it. You've done it. You've read all three of my signs correctly and responded perfectly. Your people get to stay, to live in peace, to thrive and to prosper. You always will be welcome here while I'm King."

That night in the royal court, all the powerful people around the King said, "Your Highness, we saw the debate, but we don't really understand. Could you explain to us what happened? The King replied, "You know it's the most amazing thing. I never thought any of the Jews could figure it out, let alone Yonkel the chicken man. I spread out my fingers to show that the Jewish people were dispersed all over the world and were weak in their isolation. Yonkel held up one fist to show that the Jewish people were strong and united in the hand of God. A wonderful answer. Then, I raised two fingers to signal that there are two Kings -- the King on earth and the King in heaven. But Yonkel raised only one finger straight up to indicate that there is only one King, the King in heaven. Last, I pulled a piece of rotten cheese out of my cloak to symbolize that the Jewish religion and the Jewish culture had grown stale and moldy. Yet, Yonkel, that Yonkel, calmly reached into his pocket and pulled out an egg – the best symbol of wholeness, perfection and the new life. What brilliant answers to the sign language questions i posed. i had no choice but to concede defeat and allow the Jews to remain here."

Meanwhile, that same night, everyone in the Jewish community is gathered at Yonkel's chicken shop. They're cheering and shouting "Mazel tov" and other congratulations. when they calm down, they turn and ask: "So, Yonkel, what was that all about? We're glad you won, but we don't understand. what happened in the debate". Yonkel shrugs and admits: "To tell you the truth, it really wasn't much of a debate. First, the king sticks his hand out like he's going to slap me, so I put up my fist to defend myself. Second, he goes to poke out my eyes with his two fingers and so, I lift up my one finger to block it. by then, I guess he knows I'm not going to just run away, so he takes out some cheese for a lunch break and I take my egg out to have lunch, too!

I love that story. It's actually a microcosm of the history of Jewish people. There's a joke among Jewish people that all the Jewish religious holidays are variations on one theme:. They tried to wipe us out – we survived – let's eat! But, how is it connected to this conference and its theme?

For me the connection is that if we're talking about Jews, or we're talking about indigenous people, or we're talking about many rural people, we're actually talking about peoples and communities that have been marginalized, discriminated against, harmed and persecuted. These populations do not, by and large, have a history of being beloved, respected, understood and assisted by "the powers that be" in their time and place. Yet, they are all people, communities and cultures that have survived.

Sometimes they've survived by luck, sometimes by hard work, sometimes by cleverness and who knows, maybe even by the grace of God. For me the lesson of the Yonkel story is that sometimes survival is facilitated by *misunderstandings* Yonkel would not have been wise to go to the King and explain his version of what happened during the sign language debate.

In the rural context, I have seen the same phenomenon. There are times when the bucolic view of rurality --the nostalgic, romantic view -- leads policymakers to treat rural areas in ways that end up being beneficial. They do the right things for the wrong reasons. I personally have no doubt that rural people, rural communities, rural economies, and rural cultures will survive not only this decade, not only this century, but for as far into human history as we're going to go as a species. They will survive . . . And they will change.

This Conference has given me enormous hope and reinforced by conviction about the ability and likelihood of rural people, rural communities, rural economies, rural cultures and rural schools, surviving -- and occasionally thriving. It's been heartening for somebody who's been in this field for 30 years to see so many new people who care so deeply and who are contributing so much that's new and valuable and worth. It's a delight to know that the struggle will continue and will be in good hands.

Yet, it's been a particular pleasure to catch up with some of my old colleagues and friends; people with whom I've worked on and off for at least a decade and in some cases for more than a quarter of a century. What I've learned is that the work that we only talked about 25 years ago now has become real. Work that represented a set of hopes and dreams and wishes about what *could* happen has, in fact, happened. Just look at the extraordinary work that old friends like John Bryden, Ray Barnhardt, Tom Tiller (as the successor to my even older Norwegian colleague Karl Jan Solstad, David Mcswan, Jack Shelton, Paul Nachtigal and Toni Haas have accomplished. They have been incredibly persistent. The key to making those wishes, dreams, hopes and aspirations coming true has been their willingness to stick with fundamentally sound ideas, to stick with a set of honorable principles, to stick with a set of convictions about the basic goodness of rural people and communities – and to stick with a fundamental sense of hope and possibility. I am deeply impressed by what I've seen and heard in all of those cases.

Ray Barnhardt had to return earlier to Alaska, so I'll make him blush in absentia. I remember conversations three decades ago with Ray talking about how important it is and how it would be a great thing if we were ever able to merge indigenous and western ways of knowing and teaching. And, we discussed how great it would be if we went beyond the rhetoric of saying that rural communities could become uniquely wonderful learning labs, if only we took advantage of their advantages and honored their rurality. Ray is an example (and there are many others in this room) who successfully made the transition from saying "wouldn't it be nice" to being the catalyst making it actually happen. I admire that perseverance and dedication enormously. It gives me tremendous hope that we can, and will, continue to have genuinely rural schools, genuinely good schools, and genuinely strong rural communities and economies. All the people that I've mentioned have over a period of years "gone deep". They've had an idea and gone very deep into the development and refinement of that work until success was achieved. Now the challenge is sustainability..

In contrast to these deep colleagues, I've gone "wide". That's not just a physical reference! I have had experience in community economic development, entrepreneurship, education planning/research and rural school improvement. Some here might say that I've abandoned my rural work and no longer do anything that's of real relevance to the issues and actions at the heart of this Conference. For the past 4 and a half years, I've headed a state level child advocacy organization. It's not a rural child advocacy organization. It's not a rural education institute. It's not a rural studies center. It is a child advocacy organization trying to be of benefit to all 1.8 million children in my state, North Carolina.

Child advocacy basically comes in 3 flavours. The first is legal advocacy, i.e., attorneys who file class action law suits on behalf of children in bad circumstances as a way of using the legal system to try to bring about needed changes. The second kind of child advocacy is individual child advocacy. I work closely with a number of organizations around our state that take individual cases of children who have gotten into trouble, children who are not being helped in the ways that they need and these groups have been the voice for those children, trying to sort out their individual problems, their individual needs and resolve their individual cases. Instead, I do the third type of child advocacy – namely, public policy research, education campaigns and lobbying. In our context, this largely involves influencing state government and state lawmakers to do more good things *for* children/youth and fewer bad things *to* them. I've been involved with issues of juvenile justice and delinquency prevention, child abuse and neglect, foster parent, adoption, child fatalities, child and adolescent health/safety issues, and early childhood education. It's been an incredible learning experience and a very steep learning curve for me. I want to share with you a couple of highlights of this work because there are lessons for all of us who care deeply about rural people and rural communities.

The single best thing has been helping to create a coalition called the Covenant with North Carolina's Children. It's a coalition of more than 100 separate organizations. Members range from broad civic organizations such as Kiwanis Clubs to virtually every association of child-related professionals from the pediatricians to the school nurses, to the social workers, to the teachers and, of course, local child advocacy groups. One hundred organizations that have a combined membership of one-half million people in a state of 7.5 million people. That's a significant coalition. Half a million people gets you noticed in political circles. All these organizations coming together to create a coherent agenda and to fight for that agenda is able to make changes that no individual member group ever was able to make on its own; working in isolation from one another.

For example, in 1998, the Covenant with North Carolina's Children was instrumental in persuading the governor to call a special session of the state legislature that would deal with one issue and one issue only: child health insurance for modest-income working families. The details are not important here. Please visit our website: www.ncchild.org, if you want to learn more. We helped make the case, get the legislation passed and $25 million allocated (that drew down $75 million in matching federal funds). For our purposes today, what was important was the coming together of unlikely allies and the active advocacy of groups for action beyond their traditional turf. Thus, the teachers' association for the first time used its influence to promote a child health initiative, not just better salaries and benefits for teachers. The strength in unity never was more apparent.

It's now 18 months since that legislation passed and because of the hard work on a lot of organization's parts, there are 90,000 kids who can now go to the doctor and to the dentist for the first time in their lives. More than 10,000 children have received needed eyeglasses for the first time in their lives. We expect these children to succeed more fully in school, now that they can see their books and the blackboard! That seems to me like work worth doing.

[I do have to note that I go back and forth between feeling delighted at this progress and embarrassed that at the dawn of a mew millennium in the richest nation on earth, we still have tens of thousands of children for whom basic access to basic health care was not a "given.". But, we all must start from where we truly are.]

Here is the eminently practical, transferable, political lesson for all of us at this Conference. The creation of North Carolina Health Choice was a fight for children throughout our state (rural, suburban and urban) – not a fight just for rural children. It was about the fundamental right of all children to have access to decent medical and dental care. Once that right was established, once that principle was accepted, all of the eligible rural kids automatically became included. Tens of thousands of modest-income rural kids in our state got a huge benefit they never would have gotten, *if we had fought for it only as a rural issue*. It was precisely the breadth of the issue and the inclusion of a broader-than-rural constituency that made it politically-feasible for rural kids to benefit.

What I've learned by going wide, instead of deep, might be relevant to the goals of the Conference. It might be relevant to the emerging, much-needed international association that's forming and moving forward here today. The most important lesson – the heart of my message today -- is, "it's about the children." When President Clinton was elected in the United States, his basic campaign message was: "it's about the economy, stupid." You can call me stupid, but I don't think it is about the economy. From this point forward, it's not about the economy, it's not about education, it's not about health care, per se. It's not about community development, per se. It's not about improved access and delivery of services per se. All of those things are important, but they are primarily a means to an end. The end is what we have to keep focused on. We need to keep our eyes on one prize: the well-being of children.

This is not as obvious a truth as it may seem. The dirty little secret in many of our societies, is that children and youth are not respected, not loved as they should be, not nurtured as they ought to be. In fact there are way too many children who are having seriously bad, seriously unhealthy, childhoods. It's wrong – it's morally wrong and it needs to stop. In my own state, there were nearly 40,000 documented victims of child abuse and neglect last year alone. That is an appalling epidemic. And yet, there is an equally appalling silence surrounding this ugly truth. Politicians and opinion leaders get all worked up about juvenile crime. That becomes a hot political issue In our state there were 10 young people charged with murder one year. The state's leadership went berserk. There was a legislative and gubernatorial commission. There was new legislation. There were headlines. There were big stories. There was a new governmental department created. It was a big deal!

The same year, there were 70 children killed by adults. No commissions, no big reports, no new legislation, no new attempt to deal with the problem. Seven times as many kids were killed by adults as there were kids who killed anybody (mostly other kids), and nothing happened. We tend to see kids in too narrow, fragmented and instrumental ways. When society values children, it tends to value them for who they might *become*, and what they might produce, not for the human beings they are right now. Children's lives don't become real and meaningful only at some point in the future. Children's lives happen from the moment they draw breath and happen throughout their years. Those real lives and what happens to them in the here and now is vitally important.

We tend to see kids in too narrow and fragmented terms. To a teacher, a particular child is a student to be taught certain curricular material by a certain date (and to perform well on a certain standardized test). To a physician, that child is a patient to be healed of a particular disease. To a social worker, that child is a case to be managed. To a coach, that child is a player with certain role on the team. On and on. *What we need to do is to see children whole and treat them holistically.* We talk about how it "takes" a village to raise a child", but what I've noticed more and more is that the village envisioned is a village consisting of service providers. I don't think that's what children need. The fundamental need of children is not to be serviced. Rather, they need to be raised. They need to be loved and nurtured. They also need services, but services alone will not make for good childhoods, nor will a strong GDP, nor will fancy schools.

So, you well may be asking, what do I recommend?

1. What I've learned as a child advocate -- that I didn't fully understand and act upon as a rural educator, as a rural entrepreneur or as a rural community developer -- is that it's incredibly important to be deeply involved in broad, unprecedented, seemingly unlikely political coalitions. It is incredibly important to find ways to come together and put aside our personal and professional egos, put aside our narrow organizational agendas, to put aside all of the things which those currently in power use to divide us and keep us marginal , whether it's race, class, geography or heritage. We can win victories worth winning only when we are in coalition. There are different kinds and levels of coalition that serve different purposes. Join them. If there are great ones ready-made for you join, then create them.. Most of the time on most issues, especially those involving major policies or major resources, we cannot win on our own. The good news is that we don't have to fight the good fight entirely on our own.

   In this spirit, I applaud the organizers and planners of this Conference. It is healthy and wise to bring people from different backgrounds, disciplines and perspectives to this Conference. The resulting association will be stronger for its breadth and diversity. We all should support this coming together across the lines that have artificially and counter-productively divided us for too many years. We must build strong and explicitly political coalitions.

2. We need a different vision of the goal than the ones we've been pursuing. What I've learned since becoming an "professional" child advocate is that the fundamental goal worth pursuing is the goal of making our particular local community, our particular region, our particular state or province a better place in which to *be* a child and to *raise* a child. That sounds pretty innocuous. Who's going to argue with that. I would suggest to you, as innocuous sounding as it is, that there is an almost revolutionary message in there. Revolutionary because if we were to change the world in ways so that the places where children are now growing up really were better places to *be* a child and to *raise* a child, almost everything would need to change. That's why I suggest "child well-being" as the fundamental goal, the fundamental standard and the fundamental tool of evaluation for rural school reform, for rural community development and for rural economic renewal.

Consider the familiar example of the canary in the coal mine. A canary would be placed in the shafts because the miners knew that if the canary was alive, the air around them was not immediately dangerous – but, if the canary died, something was terribly wrong and in need of correction right away. *For our communities and for our society, children are the canaries to which assiduous attention must be paid.* If and when we create communities and states and a society that is truly good for children, then we also inevitably we will have accomplished our most crucial educational, economic and community development goals/aspirations. In fact, you cannot build the kinds of places which are good for children without simultaneously achieving the goals for which we have sought directly by pushing for rural school reform, rural economic improvement and rural community development.

Odd and ironic as it sounds, it may be that the *indirect* road is the most sensible and efficient one. In the context of this Conference, the indirect road is the road of fighting for all children's rights and advocating for all children's needs. By organizing in coalitions for children we can begin to broaden the alliance. Child well-being -- the notion that every child deserves a good, healthy, safe, nurturing childhood -- is one of the few areas of common ground still left to us in today's societies. We've gotten ever better at being fragmented – we've gotten ever better at having the dividing lines between us sharpen and deepen. Advocacy and action on behalf of children has the power to bring people together across the lines which have divided them historically (and very rarely to the advantage of rural and other marginalized people. Advocating for the needs of all children -- and having that be our fundamental collective goal -- will help us finally get over the urban/rural divide.

The older I get and the more I observe the way the world works, it's not urban people and urban places against rural people and rural places. Urban people and urban places are not our enemies. Our enemies are those who would harm children, are those who would put greed ahead of need, are those who would use their powers to support those who are already powerful and well entrenched, instead of giving (as the Australians put it so well) everyone "a fair go" The real divide in our world is not an urban/rural divide. It's a divide between the haves and the have nots. Between the powerful and the marginalized. We need to organize because, collectively, we have a degree of power that we cannot ever have individually or in our own little areas.

Pushing for the rights of all children is a powerful strategy for rural school reform and rural development, because it gets back to a fundamental role of government. Government only has two core roles. One is to maintain law and order for collective safety and security (i.e., its police powers). The other is the parens partiae duty for government to help those who cannot help themselves. If we can establish the primacy of child well-being, then we've made the mother of all "paradigm shifts". We'll be working in a world that is about justice and not only charity. We'll be working in a world in which doing the right thing for rural children is simply part of the fabric of a decent society, and not an act of good will by unusually enlightened, but inevitably temporary, leaders. We can create that world.

3. The final lesson I want to share with you has to do with outcomes. As I've gotten older, I'm more and more interested in accomplishing things, instead of posturing about things. I've become much more interested in winning the fights in which I engage, not just in giving them a good try. The stakes in the work that bring us together here are very high indeed. Thus, we need to be about the business of making sure that a good outcome actually is achieved for the people and communities for whom we struggle.

One final note. Of course, there are rural differences to which we – and the powers that be – must pay heed. The particular ways in which rural health care is provided for those newly-insured children in North Carolina sometimes is necessarily and productively different. I won't insult you by telling you about the values, virtues and variations of rurality – for these are topics that you already understand every bit as deeply as I do. Perhaps I am insulting you in another way (although I sincerely hope not) but suggesting that exclusively rural-focused advocacy and action may be less powerful and less effective in the long run than putting together the coalitions and constituencies for a broader campaign to achieve child well-being. By helping all of our children, we will help not only our rural kids, but also our rural communities and rural economies.

So, that's what I wanted to share with you from my perspective of "going wide." I've moved away from a rural focus in my daily endeavours, but rural people and rural communities never have left my heart.

I will end simply by thanking you for the fine work that you've done, for the extraordinary work that you're doing back home right now and for the even-better work you're going to do in the years ahead. We are each just a link in an endless chain of people trying to honor the life with which we've been blessed by being a blessing to others in return; and, to make the world a better place for our having been in it. I'm honored to be in your company and I thank you for listening to me today.

KEYNOTE ADDRESS

Better Rural Schools Building Better Rural Communities

Jack Shelton, USA

I want to say thanks to Jim and Mike and also to the staff that has been so kind and generous to us throughout the week. I want to warn Mike and Jim that I am going to try to hire away most of them.

The great American philosopher is named Lawrence Peter Barra, known to people in the United States as Yogi. He was a baseball player given to malapropos and oxi morons and non-sensical statements that bear great truth. Yogi was to speak at a meeting and he was late, and he was later and he didn't make the meeting and word got out to the press that he was lost and when he finally arrived he was interrogated by the press who asked him, "if he was lost?" He said, "Yes, I was lost but I was making very good time."

It's because of that kind of thing that my telephone rings. Educational policy and practice in my state has for a long time had a very lost quality about it but we have been making very good time. My phone rings because people are interested in keeping their schools open and my phone rings when schools get closed. I am the person in Alabama who gets the call, "can you help?" and usually the answer is "No, I can not help." Our schools have been routinely closed and school closure is something that has reverberated through this conference. I am going to tell you a small story about an attempt on the part of people in Alabama to resist school closure and to build upon the strengths of schools of small rural public schools so that they might be more appropriate for their students and more appropriate for their communities.

The story is about a group of schools that have joined together and called themselves the "PACERS Cooperative". It is a voluntary association of twenty-nine small rural public schools that are ethnically and geographically and economically representative of rural Alabama. It is not a caucus, I want to be very clear about that, it is not a caucus. A cooperative is much more difficult than a caucus. A caucus brings together people who already know their common interest and already know how to talk with each other and already have their values in line and already agree with one another. When you bring together, at least in Alabama, black people and white people and Spanish speaking people and Native American people, people of different economic backgrounds and ask them to work together it is much more complex and difficult than a caucus. And our hardest work and our most important work has been to cooperate with each other. It is a very important thing for me to say that I can not understand any way that rural communities and schools in my state can survive alone and independently and major energy must be devoted to their collaboration and their coalition. The tendency it seems among rural people is to withdraw into isolation, to be satisfied with their accomplishments and to forget the much harder and more profitable work of working together. So we are a voluntary association of all sorts of people.

Our definition by goals is fairly simple. We wanted to keep schools open by making visible their viability. Now that's a very important thing for us, making visible their viability. Not writing about it simply or necessarily, not talking about it, not talking to policy makers but making the schools visible and making at the same time their viability visible. This was our fundamental task.

People had to be able to see small rural public schools because they were no longer seen and therefore could not be understood. This goal of keeping schools open by demonstrating their viability, making their viability visible in part by building upon their strengths was fuelled by four objectives. We wanted to develop appropriate curricular and extra curricular opportunities for schools, students, and that involved people in the community. We knew there was value in cost effective technology but by god we wanted to own the technology. We did not want a centre pivot irrigation technology where some university was piping stuff out to us. We wanted to build the curriculum and we wanted to use interactive technology through which our own teachers could design courses and could teach. We did not want to cultivate any further the dependency on some extra community or extra school organization. I say that with a lot of energy and with a lot of overstatement but none the less it has proved to be a very effective way for us to go forward. Another thing that we wanted to do was to move from passive to active. Schools are so dreadfully passive now that it is a deplorable quality and characteristics of schools. Please come in, please sit down, please shut up, please fold back the top of your head, we will pour something in your head, sometime later in your life we will find out how much you can pour back out through your mouth, nose or hands. Rural schools are emulated by rural communities which often become passive especially in the drive to collaborate and cooperate with others. And the fourth thing was we wanted to generate information and research.

Now we believe that our cooperation and our goals and objectives would gather partners. How did we go about this? I'm going to tell you quickly a story about my father. In 1947 he and I were sitting in a restaurant in Birmingham Alabama. Birmingham is the largest city and my father's leg was shot off in the "Battle of the Bulge" and he paid a terrific price for that. He never lived a pain free day in his life after that and he had to make a powerfully conscious decision to survive. He laid in a VA hospital for six months and would not eat, was forced to eat and he almost died. The reason he survived was an orderly found out that he was a good swimmer and came and picked him up, he was a huge man, but he was under 100 pounds. The orderly picked him up and threw him in a swimming pool and said, "sink or swim" and walked out and he swam. We were sitting in the restaurant and that's the background that you need to understand the story because a very kind southern women recognizing immediately that he had been in the second world war came by and put her arm around his shoulders and said to him, "I'm so sorry you lost your leg." He said to her, to my great shock, "hell lady I didn't lose it, I know right where it is!" His point was "deal with what's in front of you lady, deal with what's there." That is an attitude and disposition that we have taken in our work. It's not what we don't have that marks our communities and our schools in the first order, it's what we have. It's what's there. It's not what we can necessarily get from some other place. We set out not to be pathological. This is not to dismiss needs and problems and I can tell you about needs and problems and I can tell you stories that would break your heart. But the starting ground for us was that we were not "no place". We were not the sticks, we were not the happy hunting grounds for missionaries and mercenaries. In our work we focused upon our schools and communities as effective institutions despite woeful funding, missing support, and abusive policies.

We also said we are going to make connections and these are the connections that we sought and seeked to make between schools and communities trying to make boundaries so fluid that it is hard to tell when you are in one and when you are in the other. The second is to make connections between learning in place and the third is to make connections between schools and communities in one community with another community. Schools of one race with schools of another race. Integrated schools with non-integrated schools and so forth, but making connections was fundamental to us. Then we had to identify the coordinates and set our agenda. One thing we wanted to do was create long term partnerships that would produce public outcomes. We also had to determine if there was a compelling interest that would bring us together and sustain us and we had to create our agendas. We had to create our action agendas. So fostering our collaboration, trying to figure out what the public outcomes were that we needed and setting the agenda for schools was a starting place which involved all our schools, all our communities, young people, teachers, across the state. Excuse the language I'm about to use but in the three and a half months of organizing this cooperative which I call a hemorrhoidal occupation because I burned up $17,000 dollars worth of gasoline money in three and a half months. So it was a matter of getting out and getting with the people.

Now we got all that done and we had to start coming to terms with what is the language that we are using and there are four terms that I have in bold here but I guess they got in bold over time but there are many words that could substitute. One thing was we wanted all our programs, everything to be active, that is kids, student centered learners, students responsible for their own learning, students making decisions and we have been very much informed in that by a long term conversation with Real Enterprises which Jonathan was the brains behind and Foxfire which has been a very close working partner of ours for some time. So, active learning.

The second was contexturalized or place learning. It has been talked about communities as living labs but I want to talk about what has happened in a lot of our schools which is we have changed the nature of the space inside the schools or on the school grounds. So that we have bog ponds, passive solar green houses, aquaponics unit, photography labs, publishing labs, presses, any number of things that are now spaces and equipment, industry standard tools that are inside schools or built adjacent to schools which in a way attempt to bring inside the school the learning spaces that young people really need.

The third thing is no money goes to anything that does not produce a public outcome and to say this really quickly. Our schools are frozen from January to April because all the schools in our cooperative are majority poverty schools. Some of them are ninety-five percent free and reduced lunch and schools of that sort do not do well on standardized testing and the state imposes tremendous sanctions upon schools. No money but tremendous sanctions upon schools that don't do well. There are a lot of ways to fight that. One ways is to try and get the policy changed but something that we have been out after is that schools should do things that people in the communities can use their own unmediated judgment to determine the value of it. It's to much the case in the United States that somebody at Stanford or Princeton tells somebody in Oakman Alabama whether their school is worth a dam and nobody in Stanford or Princeton knows where Oakman is. The people at Oakman know what they want and they know what their value is but sometimes they can't get at it because their schools do not produce tangible outcomes that they can measure. Those are three, Active, Placed, Public Outcomes that invite unmediated judgment and the fourth is a term we have trade marked. You can use it. It's a term we trademarked because all the terms that I have heard did not capture what we were doing, and the term that we have used is "consequential learning". That is asking ourselves the question, "Does the learning that goes on here, make a difference and to whom does it make a difference?" So we have students who have become defacto publishers of newspapers for their communities, historians for their communities, scientists for their communities, artists for their communities, home builders for their communities, and so on and so on. So that young people are immediately known in their communities as people who make a difference to the quality of life of that place. The second is that when young people know that it is consequential for them because they learn that they can make a difference in those places. I think that one of the reasons for ruralite migration is that young people have never come, had the opportunities to understand what a difference they can make in reshaping the vary places where they live. There are many things I could go on about what makes learning consequential but the third thing is that it is very important to young people to be known as people who can make a difference. Young people tell me that all the time.

Those were our ideas and we got together and so what are the outcomes. Well, one that I am going over real quickly is, we found a lot of partners and we found an awful lot of funders. The partners include going in Jonathan's directions, include A+, which is the most effectual school reform advocacy group in Alabama. Children's Voices, which is the children's advocacy group. Alabama Rise, which is a poverty policy organization, The Alabama Poverty Project, The Alabama Children's Commissioner's Office, and so forth. There is not an effectual advocacy group in the state that we have not been invited to link with. We didn't set out to do that but when they saw our work they invited us in or when we saw the necessity of them being engaged in our work we went to them. Our partners now include schools and school systems and many communities, the office of the governor and if you knew this history you would laugh. We actually get a lot of money from the Alabama State Department of Education. Ten years ago when I walked into the State Department of Educations building all the doors were bolted. Now they are open. So we came away with partners, with a variety of funders: Lyndhurst, Aninburg, Ford, US Department of Agriculture, The Appalachian Regional Commission, The Alabama Development Office, The Arts and Humanities Council State and National, The Alabama Legislature, The State Department of Education, and a lot of local businesses. There were results to our work. Now, there are three formats that came out of our work that I want to mention to you.

The first of them, I brought some kids along with me and they are going to be up here on the screen and the first outcome is a program called "Better Schools Building Better Communities" and there are some students on tape who are going to talk to you now about that.

The PACERS Small Schools Cooperative is an Association of twenty-nine small public schools in twenty five communities in rural Alabama. The schools of PACERS Cooperative work together to develop and implement academic programs that capitalize on the advantages of small school size. PACERS schools have designed a variety of projects through which students do academic work with real consequences in their communities. Through this work students are engaged in the study, service and celebration of their communities.

Student 1:
What is an education?

Education is learning, teaching, and experience, is courteous and not criticizing others. Education is being inventive, not destructive.

Student 2:
It's caring and being helpful to your society. It's being able to listen and comprehend attentively. Education is having knowledge to distinguish the uses of certain books. It's making friends, not enemies. Education is what we learn through school, people, books and experiences.

Student 3:
It's the ability to communicate freely with others. Education gives us the skills that goes best with what we choose to achieve in life. It gives a perception of what is right and wrong.

Student 4:
Education is being able to enjoy life's offers. It's being able to succeed in life without hurting others. Education is respecting other people's opinions. It is having the right amount of confidence in yourself.

Student 5:
Education is being able to forgive and to share with generosity - Sophia Duke's, tenth grade.

Student 6:
There was always this thing, I know I often heard in high school, elementary school, on up a lot of students heard this before as well, to where people say that you can achieve anything you want to. The thing is with that, at the time I knew I could achieve anything I wanted to, but I didn't understand I could achieve anything I wanted to.

Student 7:
Really, I didn't care a lot about school. I mean I knew I had to get up and go everyday and I had to make it until I graduated but probably if would have been my choice, if my parents hadn't made me stay in school I would have

been fine dropping out when I was sixteen and going and getting my GED.

Student 8:
When I was little I always knew I was going to college. It was a given in my family, after high school you go to college. But I really didn't have a direction, I didn't know what I wanted to do when I got to college.

Student 9:
I was losing interest in high school, you know when I first went to high school. I was a pretty decent student up to the sixth grade. I was you know "A" and "B" honor role, pretty good kid but in the seventh grade I started going down hill and in the eight grade it was just getting worse, starting going down hill. I didn't have much interest in school, didn't want to do homework and just kind of passing by.

Student 10
I can honestly say in ninth grade I was acting like a complete and total fool. Which at any high school I would have done the same. You were in that transition period, especially with the system of education we had to where if you weren't the top in the class you weren't the one that was recognized.

Student 11:
High School classrooms are notorious for 8½ by 11 sheets of paper that are designed by folks with good intentions but were not knowledgeable of the community that these worksheets are going to because it doesn't have any real application for that student. Pressure comes along and says that ain't cutting it. Pressure says, "you got to take what you learn in the classroom, you got to realize what your going to learn in school is going to take you for the rest of your life." You've got to say "okay, what I'm learning in the classroom is how I'm going to apply. I'm going to apply my English to work on the newspaper. I'm going to apply my science to growing the fish. I'm going to take my math and I'm going to apply it to working on house construction."

Student 12:
School to me changed a little bit you know. The interest in getting up in the morning and going to school changed. I knew what I was going to do 8:00 the bell rang I'd be in the class. But I knew in the evening after the PACERS project did come to our school that I would be working on the newspaper project. That I would be fooling around with the computer coming up with a new design. My feelings of school changed because it was a little bit more interesting for me as well as the students. We all knew that seventh period was coming we better work on the newspaper project, you know we had to do a story, we had to do an article, we had to interview somebody. Where as before seventh period was coming we was going to be in a class with a book. Everybody nodding off going to sleep maybe.

Student 13:
Working in the PACERS Cooperative helped me learn a lot about myself. A lot of ways I learn better, the things that I like to do, the things that I'm able to do.

Student 14:
Through the PACERS way of learning through doing, you know hands on, you are learning but yet you are giving back to your community and you're applying something that you've learned in the project to some aspect that goes out in to the community and also to your future. It gives you a chance to show what you have learned in the project to your family, to people outside, to your community, and to people abroad and it gives you some feeling of recognition. To prove that you have done something rather than taking home your letter grade and say here mom I made an "A". Here mom I laid out this newspaper. Here mom I'm the editor, this is my article. It gives you a little bit more.

Student 15:
I think if every clients had a public outcome, I think to start with it would be a lot more fun, it would be more enjoyable. In band and stuff when we get public complements and stuff like that it encourages us to do more because no body has every complimented us on what we did in science, or English or history, stuff like that but they have complimented us on our drama, on our band and when we really start being honest that is the stuff we enjoy. Is the stuff that we see other people enjoying and I think we saw the community enjoying what happened in history class and science class and English class. I think that would encourage us to do more and to have more fun with it and as a result of that learn more.

Student 16:
Getting something out of learning is what I mainly go for when I go into a class. I tell myself maybe the first of the semester, the new nine weeks, well I'm going to make something of it, I'm going to be interested in it. But in a lot of cases it's just hard to keep your attention focused on that when your constantly day after day doing routine paper work. And that's another thing I really like about the PACERS Real Program is that you know you are all working together and your not just sitting around a table or at a desk, you're actually getting out making phone calls, doing computer work you know it's kind of like a real job. It's like your really getting out there and doing something.

Student 17:
There is so much competition in the classroom. Who's going to be valedictorian, who's going to be salutatorian, who has the highest GPA. It's really great to know that

you don't have to compete against each other all the time. You can come together to make something work.

Student 18:
When we go out to a bid to decide if we do a job and you want 20 2 x 4's cut to six feet you know. You are suppose to cut them exactly six feet, if you was in a classroom and I wrote that down on a test and it wasn't right and then maybe it would be a few points but I could still pass the test but out in the field you are actually doing work that's money and time and materials you know and that would be frustrating and the more I started caring abut the work I was doing physically through the greenhouse project through PACERS then the more I started caring about my school work and it improved my grades, my attitudes and a lot of my teachers told me that. That was some of the best things that every happened to me.

Student 19:
That's what I really did enjoy about the photography and I think it was one reason it was so easy for me to like it because you actually get in there and do it and it was easier for me to learn that way and it was like yeh, I had finally found something that I can do. It gave me a sense of self worth, finally.

Student 20
Education through PACERS is something concrete. Each project produces a product, that's something that the student's see. It's something they can hold. Rather than saying okay I made an "A" that's it. Where on the newspaper project or any other project in PACERS, there is a product that is professional, you know, something you can hold, something that everybody else sees. Like for me now I work for the Birmingham Times, which is something that I got from the knowledge that I learned by working through PACERS and learning through doing. I mean right now I have papers in a truck and that's something concrete. There is like the stores, they have a business, there is the Red Letter Print Company, they print business cards and many things and as well as the Book Writer, or the Day Care, other projects like that. They have something that they can go out and show people, something they can touch, something that they feel is important to them and that's their education. They can tell you like through the solar house project, if you take one of those students that done that project, that was there from beginning to end and they built something that was concrete that they can touch. They can tell you nail for nail what they have done and yet do it again. That's PACERS learning, that's their education.

I want to mention two other outcomes of our work. The Better School's Program, there are a lot of hand outs on one of the tables back here that describes the projects and how to do them and how to get in touch with people about them but there are two others things that I want to talk about quickly. One is that a format that came out of our work is we call "Alabama Real" and in that project we have started more than fifty now School Based Enterprises. We are using the curriculum from Real Enterprises and the Teacher Training in schools K through 14. We have started re-building institutions, especially related to money. We have started school community education foundations as a catchment for money and for gathering in resources from rural people who are and what I call the diasporum and we are also starting school based and community based enterprises. School based and community based Credit Unions as ways to keep capital in communities and as a way to begin thrift and investment education with kids. We also have become, in the states there are what are called school to career programs, we have been invited to be a state wide school to career program in Alabama which means we are in a position to help rural kids throughout the state in a variety of ways that relate their education to their careers.

One other outcome which is an overwhelming outcome for us is that our program has been invited to create what the Governor of the State is calling the Alabama On-Line High School. The legislature gave us about a million dollars this year and the State Department of Education is putting in another half million or so, maybe more than that. In the upcoming year in order for us in order to implement on-line, all the courses that are mandated by the Alabama State Education Accountable Act, that's twenty-nine courses. What it will mean in affect is that every school in Alabama can get every course required and that is a very important thing for the time that I have worked many schools get closed under the rational that they can not provide the courses and very shortly now that will not be an issue in the state of Alabama because all the kids will be able to get courses and we have hired twenty five Alabama teachers to design the courses and we are hiring the teachers to teach the courses. So it will be courses designed by Alabama teachers, using Alabama standards for Alabama students. At the same time the State Department of Education has put additional money into our work for remediation courses. Our state is under terrible duress about high school graduation exams and we have many, many kids who flunked the high school examination, graduation examination. We have the most difficult graduation examination in the United States. We also with the exception of one state put less money into children's education than any state. So we have imposed upon our young people the absolute highest standards in the United States and we have given them the absolute lowest amount of resources. The State Superintendent of Education called me and he said in affect, "I don't know any way out of the box unless PACERS will help us." And so we have been asked to use our approaches to design remediation units and remediation courses and to hire teachers who are not necessarily rural teachers but to design adaptive courses and remediation and preparation units so that our kids have a more equitable chance of getting out of high school. We didn't think all of this was going to happen when we got started. We just trusted that the way we were going about things was right and that if our kids could shine so to speak, if they could do what was in them to do and if it was public and if we did a good job of presenting it to people who make policy and help to form practise we could make a difference in the state. Now it's a small story, it's a small state, it's a small group of folks but I like to think it's a pretty good parable of what happens when people come together to build upon their own strengths, to use their own resources, intend to make their work public and intend to change the way things are. Thank you.

KEYNOTE ADDRESS
Rural Health Reform: Canadian Opportunities

John Wootton, Canada

Thank you very much Jim and it is a great pleasure to be here. I am learning as I travel around the country about the incredible variety of not only places, but people and perspectives. I am probably the poorer for not having been able to be here at this conference for the earlier part of the week. I feel somewhat intimidated to be facing an audience who's minds are buzzing with all the connections that you have made over the course of the week and some of which I've heard of in talking formally this morning.

I will give you a context of a little bit of what I'll be talking about and then I am going to tell you a story that is informing a little bit about what I've been working on. The context is a little bit about definitions. I'll tell you something about what is happening in Health discussions with respect to rural and with respect to the broader issues and in that vein I appreciate the perspective that was given to us a little bit earlier about how important it is to look at the big picture in order for the little picture to make sense and to benefit from broader activities. I am going to describe some of the challenges and opportunities. Some of these that have come to me in my professional life but others that really come to me in the interactions I have with other people. I am going to describe some of the actions that I am involved in and others are involved in. Not in an attempt to describe them as comprehensive or even necessarily as the most important things but a panorama of different initiatives. I think all searching for some sort of cohesion and cohesiveness and maybe that cohesion and cohesiveness really has to come from rural communities themselves and that is maybe my subtext. I will look ahead to try and describe what I think is where we should be heading or where we can be heading and what tools we have to maybe get there.

As Jim mentioned I am a rural family physician and in front of some audiences I find the need to apologize for a medical perspective, however, in front of rural audiences, who I think recognize that in rural Canada there is a much broader community coalition that exists and certainly in my experience that has been the case, I feel less concerned about that. That will lead me to the story that I am going to tell you which is a story that comes first out of my practise and second out of an experience early on in the mandate as director of the Office of Rural Health.

The story from my practise comes from Shaw Ville Quebec, which is a small community of 1500 people. It has a small hospital. Many of the people who work at that hospital, the nurses, the other professionals, either have roots in the community or have family members living there or have been there long enough to put down some roots. This one particular day I was called to a delivery of one of my patients, at the same time as I was called to our small but robust intensive care unit to look after her grandfather. Basically her grandfather was dieing and she was having a baby. Neither of those processes actually had very much to do with me, however, I was a bridge between them. Not only a bridge in terms of having an involvement and an emotional commitment to both processes but the delivery was happening on the second floor and the intensive care unit was downstairs and I was bridging up and down between those two things. Extraordinarily both events occurred within fifteen minutes of each other. Her grandfather dieing and she giving birth to his great grandson. The fact that this was a small community hospital. The fact that these individuals had many tendrils in to the community. That many other folks in the hospital had various sorts of connections to these two events made it a very palpable community happening. To which I was more privilege to be a part of than an active intervener in any of the outcomes.

I thought of that story when early in the mandate of the Office of Rural Health, I was interviewed after that meeting in White Horse that Jim alluded to by a number of reporters who were interested in the role of the office and one reporter who was from a rural community detecting a certain apology in my interview about the services available in rural Canada said, "No, you should be celebrating them because in fact they have the option" and this particular reporter and I forget the details had experienced something, "they have the opportunity to be perfect, to be very community centred to be as good as they can be." And I have grown to think as this area has been developed and I start to think about health from a community perspective that the depth of community involvement in their own context and the quality of the links that they make with the systems that exists in their midst really do give an opportunity that is rarely available in more complex societies in more complex groupings of individuals to really be excellent and to develop excellence and so I come at this topic really from the perspective that it is possible to be excellent. There is excellence already occurring and there are places where it is not occurring and that if I have a role it is as large processes unfold to celebrate the things that are done well, to identify the things that are common factors where things do happen well and to share those stories and to try to extract the lessons that are needed to share.

The fact that it is an important issue probably doesn't need to be emphasized in front of this audience but there are many people that I talk to who really are not aware of how rural Canada is. Are not aware that depending on your definition and one for convenience although there are many others that we use is one from the OECD which identifies Canada as being more rural than some, less rural than others but much more rural than you would expect and much more rural than many Canadians particularly in the seventy percent who are not rural know about. I don't know how well you can see that but that with a definition that is roughly that communities ten thousand and under are rural that we are at about thirty percent or a little bit more. I use a figure of a third, thirty percent, just because that seems to be something that people can remember.

The other thing that I think is important and here I am being a little reductionist is to focus on this and I say this only in a very practical sense. I think that probably the entire conference this week has been about health. I really believe that there are many descriptions of health and many things which people mean by health. I think there can even be health in the midst of disease and that health is something that is much more linked to quality of life than it is to a clinical record. Irrespective of that in the Canadian context in which we find ourselves, one aspect of quality of life and it was mentioned also in the previous speaker who was talking about the children who did not have health insurance in the United States that the Health Care system is on people's minds and having the things which are insured in the Canadian context accessible is a concern and preoccupation of Canadians. And that one route, particularly in rural communities to import some of the other things that we know about health is in fact to make that accessibility something that people can count on and this is the insight that Steven Lewis had in making this comment "that the one way to bring communities on side is in fact to make available to them the societal consensus about the basket of services which we in fact do pay for as our Health Care System and have equity and availability available not only in urban Canada but also rural Canada."

Than puts us squarely in to the current context of the National debate that we are having both nationally and provincially. The national debate is really not one of reform. I think if you look at details, you look at the country in contrast to many other countries in the world we don't need to reform things in the sense that they are off the rails but we do need to renew and there are many things changing around us that are changing quickly and we have to make those new changes accessible and that there has to be equity behind what it is that we decide to do. I put down as some of the basic principles, the principles of equity, of affordability, of ethicacy, and of quality of life. I think those are actually quite a tall order. I think that there are many issues to do with ethicacy that we know very little about. There are many issues to do with affordability that we find we have not many of the levers or don't know how to control the levers and there are many institutionalized examples of inequity, particularly between rural and urban which have long histories and will be difficult to change. As be talk about the system as a whole and as we engage in a national debate, as we go wide, to use the words of a previous speaker my role at Health Canada is to ensure that we keep a rural lens on the larger process and make sure rural Canada is also a beneficiary.

I have plucked a few quotes from current documents that are feeding part of this discussion. This is from a report which came out just a week or so ago and it speaks to the fact that as we change things we need to have end points. We need to have things that we can measure in order to know not only where to go but whether we have got there when we decide to take another look at it. This is the national perspective that this information is being applied to. It's curious that the phrase that is reproduced here has been picked up by almost every health system that I have had a chance to look at partly because it is a very symmetrical thing to say, the right service, by the right people at the right time in the most effective way. But underneath it I think are all the principles, many of which are I think enunciated in your discussions at this meeting that saying the right people implies that it is a variety of people cooperating together. Saying it's the right services, implies that there are wrong ones and that there are inappropriately applied ones and that we need information in order to know the difference. Saying that there is a right time implies that there is a wrong one and that there are things that we need to know in order to know when the right time is and clearly there is a societal discussion about effectiveness and efficiency since we are all payers.

If that is the broad understanding of the issue the rural perspective is that not simply that it can't be done because clearly as I think my story clearly illustrated it can be done and it can be done very well but it is difficult to do and that there are many barriers and that over time and particularly in the last ten years in this country and even over time before that in other countries such as Australia, these barriers have been fairly extensively evaluated, there are common themes which have emerged and the difficulties that must be overcome are really things that need to built on the identification of those difficulties. I particularly like this quote because it comes from the youth of my health care profession from which many of the community initiatives and from whom many of the innovations will come and the process of renewal both at the community level and at the professional level must connect very strongly to the youth that is coming behind. Interestingly in a conference that many of you were at in Maygog, Quebec, last week where many of the same issues were discussed by members of rural communities across the country, there were very positive messages given by youth and a real willingness to contribute and participate and even the very straightforward message from one speaker to say, "don't be afraid to take us on as partners." And so I think that is one of the key things. It is one of the key massages that I take around in terms of making sure that what I am attempting to reflect back to people does include that perspective.

This is just one tiny bit of data. This presentation is not very data rich and I don't pretend that this bit of data is in itself the whole answer or even the specific direction in which we need to go and I think that in some of the things that I will describe in a little while we will see that in fact looking at isolated bits of data is itself somewhat dangerous. This is simply to identify maybe the extent of the issue and to bring home the point that we really are in some difficulty in rural Canada with our current way of organizing services and having providers. I go around and meet many rural communities and listen to their concerns about their system and although I do hear that they need rural physicians, what I hear underneath is that with our current organization physicians are often the entrance to the system and that the thing that is cut off when rural physicians leave or retire or are not available for one reason or another in rural communities is that the system is then not available except through very Byzantine sorts of ways and inappropriate ways and although I think the current debate is about different ways of organizing ourselves in order to improve access I think we need to keep our eye on the ball and say that really what we are interested in not access to physicians but access to the system.

So I am often asked whether what I'm developing is a rural health strategy and I have to be very careful because in Canada we organize ourselves in I think very functional way but a way which gives us difficulties in certain areas. I don't think it is probably up to any one jurisdiction or any one group to formulate a rural health strategy and in fact probably a strategy done that way has all the worst features of top down. Therefore I think what a rural health strategy is, is learning the best wisdom of the individuals best suited to share their wisdom and I always grow the characteristics of that strategy from people first. And one of the roles of the office of Rural Health at Health Canada is to be a condowit through which not only the views of people can be articulated but that the place of people within the system can be reinforced and rural people have said in places like Maygog and through the rural dialogue that irrespective of the opportunities that technology give us and irrespective of the availability of those sorts of ways to deliver services that people do want people at the centre of the system.

However, those people need to do certain things and so the breadth of services is really the next layer of what a rural health strategy, however, it is enunciated and by whoever it is enunciated would contain. Those people and those services can be effective or they can be ineffective. The best example I like to use is, it's fine to have physicians and it is fine to have hospitals who have the capacity to deliver babies, but if all the physicians decide not to deliver babies, you have the people, but you don't have the services and the system within in which we work and whether or not it facilitates those goals whether it be delivering babies close to home, whether it be emergency services, whether it be access to primary care services, whether it be care for the elderly or support in the home. You can pick probably any of the current topics in the basket of the health care system and all of them involve people, they involve people doing something and they involve people working within a system. If there is change in the wind it probably is as much to do with how we organize the system, how we put those people and those services together than it has to do with creating more people or offering more services.

Under penning those three basic elements, the rural health strategy must involved consultation and it must involve research. Consultation is a very broad concept that I think is never ending. I think it shares many features with research although it is not the same thing. I think consultation is very inclusive of points of view from many different areas of society and they in some sense need to set the framework for the questions that are asked and for the information that people need in order to make decisions. All of this needs a political will and I can tell you that at the federal level the federal liberal rural caucus which is made up of representatives of the government from rural communities do take this issue on behalf of their constituents seriously and have been pushing my office and the government to engage seriously in this debate. I think that is one direction in which consultation occurs. I think there are several and I think they are probably all to some extent valid.

This is just another way perhaps of restating some of the things that I said about the features of a rural health strategy. What we have come to realize, I think, is that we have formulated some questions and it is not the "what" that is at issue but it's really the "how". So if we are concerned about health human resources we know we need them. We know in Canada we are short of nurses. We know that in rural communities there are many services that are not available and we know there are people that need to be deployed differently perhaps to take on multiple roles. How we train them, how we deploy them, how we support them. Those are some of the specific questions that some of the initiatives that are being taken are being structured to address. We also know that there is an infrastructure challenge and that there is an organizational challenge which reflects some of the issues that I mentioned earlier.

The importance of that research element for the information piece is that there are many differences in rural communities that need to be addressed. Some of these differences are demographic, some of them are cultural, particularly in first nations communities, some of them flow from the traditional roles that we have asked people to play. Who does what and what roles are we going to ask them to play in the future and what barriers are there from what is available in rural communities to the rest of the system. Those are some of the things that we have to overcome. One of the reasons that we have to overcome them were brought out to me at least in Maygog by a very interesting presentation by a speaker really looking at the global situation. It's not an accident that many people are starting to be preoccupied with the health of their communities as the larger world gets more uncertain as the actions of a fifteen year old in Manila can have world wide repercussions we need to know what is stable behind that and that leads to wanting to address local concerns. So the opportunity and really this should be framed as an opportunity, to do this in rural communities is to build on the strengths that are there. According to Dr. Stein in many rural communities across the world it is demonstrateable that the community links the things which facilitate the ability to build from the community level are more present in rural areas than they are elsewhere. Therefore, although it is true that there is a resource shortfall and it may be true that there is a health human resource shortfall and with consequences to services, there is the opportunity in fact to build on the network of relationships that exist in rural areas and use that as a very firm foundation to develop from.

Some of these processes need in Canada anyway high level context with in which to operate. It has been pointed out I think by many speakers and I have only heard a small portion of them but I hear this as an echo from the week that partnerships, coalitions, anything which facilitates that is an important framework with in which to allow these things to happen. In Canada most recently we have a social union framework agreement around health which defines to some extent how it is that we are going to work together. I think that this is something that we are working on. I think this is something that the public is engaged in the debate about but the partnerships have to extend far beyond simply the governments. Although, it is important that those partnerships be palpable and effective but there have to be partnerships around what it is the governments choose to do. Partnerships between the professions. Partnerships at the level of organization between communities where resources are shared. These sorts of partnerships are probably more important than actually the amount of resources that are put in. The reason these partnerships are so important is in fact that no region is the same from part of the country to the other. I have visited many communities, many regions. There are common themes but what will work in one place, will not necessarily work in another and so that the contribution of the partnerships at the highest level is to set a direction but not to determine the "how", not to determine how things are implemented. It is probably true in Canada and I think it is even true in Australia where the structure of the government is different that regardless of the structure you have to depend on local knowledge of what works best in order for implementation to have a chance of success.

Given all that and given that we need to decide to actually do something with all that information, what is it that we can do, what are we doing and at the federal level how can the federal government facilitate that process? One way to look at the process is to understand how it is that we move from information to knowledge and to wisdom. I like to look at these three institutions, the report that I quoted from which has just come out with the first attempt to quantify what it is that our system does provide. That gives us information but doesn't tell us what to do with it. We have also on the horizon the Canadian Institutes for Health Research to whom many of those questions will be presented including the questions that arise out of the rural context and from which some knowledge will be extracted. We have had a national forum on health which has given us some directions to implement some of this knowledge in to change structures. Those are processes that are actively going on now and it is appropriate I think that a year and a half ago that Health Canada should have created an office of rural health to ensure that a rural lens is applied to changes and to decisions that are made as this process moves forward. The commitment to apply a rural lens comes at the federal government from the highest level and this is although a bit arbitrary is maybe one place to start with the speech from the throne in 1997 in which this was articulated.

So after all of that what exactly is it that anybody is dong. I think that without pretending that this covers the entire spectrum of what could be done because I know it doesn't. I am going to tell you about some of the things that are in fact happening right now. The Office of Rural Health is administering a rural and remote health innovations initiative which is both a national and a provincial process. This is designed to support innovative projects specifically with rural communities in mind and which are identified very much at the regional level. At the national level it recognizes there are some broad issues to be addressed and we are hoping there will be national projects that will also address some of the gaps that have been identified.

The health transition fund is another process that some of you may be familiar with which is on going in the sense there are projects that are being done in many areas of the country with respect to health. With the recognition that as we manage the transition from the health care system that we have had to one that we may image that we will have that there will be transitional difficulties and there will be things we will need to know along the way. These are some examples of health transition fund projects which are exploring some of the technology pieces and some of the other aspects of change. There has been a health infrastructure support program which has supported many technology initiatives across the country with respect to health and there is one in Nanaimo which is a very interesting one, in which using a little bit the same canary metaphor, looks at the health in the ecosystem as an early warning sign for health threats which may extend beyond that. That process has become the chip program which some of you may be aware of. Which is a health technology fund as well announced in the 1999 budget which attempts to go the next step beyond pilot projects. I think there is a recognition that there needs to be a balance between our thirst to get information and be absolutely sure of what needs to be done before we do anything and the recognition that in fact we will never get there and there will never be enough information to be absolutely sure that we are dong the right thing. Therefore, as we move from pilot projects towards implementation I think we have progressively moved towards acting from better information but we never act from perfect information.

I have left to the last, maybe the most contentious current issue and I mention it only I think to give due place to the partnership that is required between the federal government and provincial jurisdictions and the social debate that underlies both parts of that. Clearly applying a rural lens to this process in order that the best choices be made is an important role and I know that there are people applying the rural lens not only in my office at the federal level but also in many provincial offices and in many community groups. The sum of those perspectives make a powerful argument for coming out of this debate with a system that is more balanced and in fact better suited to achieving the goals that we set for it.

So what would that look like if we actually achieved what we are setting out to do? I think any new system in Canada or any system to which we transition will be people centered. I think it will be planned. I think with respect to rural communities it is particularly important that it be integrated. It is recognized there will not be everything, everywhere. Rural communities have been very understanding usually in recognizing the practical limitations that distance and critical mass impose. However, the answer to that is really truly to pay attention to integration so that other aspects of the system are available and can be available through technology, through human resources, which are trained differently, through infrastructure in order to be able to deliver on things which will affect the outcome in the directions in which we want it to go. And lastly that it will be evaluated. So that we know as we go along what the impact of our initial choices has been. Recognizing that it won't always be right and we often need to change tack.

Lastly, I think I'm just going to describe it not so much as a goal but these are probably necessary conditions. I think we need public engagement. I think conferences such as this are examples of that. I think we need public which is informed and I think that is a goal that many of the educators that are here also hold dear. I think we need a public which feels that they have an impact and the Office of Rural Health certainly one of its roles is to engage citizens and reflect their concerns. It can not succeed without collaborative partnerships and those partnerships have to accept to be evaluated and to be measured in order to redirect the ship as it moves forward. I think that rural Canada has never had a better opportunity to make its voice heard. I think there is communication going on and there is knowledge being transferred and there are communities helping each other to an extent that in my professional career I have never seen before. There is much more to be done there are regions that are less well included than others and that is an ongoing challenge to make sure that people are included. There is the continued problem that sometimes as we improve our communications tools we create groups who do not have access to them and so we have to be very careful as we listen to the voices that are communications tools provide us that in fact we have not excluded ones who do not have access to those tools. I think that the future is positive. I think that there is an opportunity in Canada to really develop centres of excellence around rural health and I am very excited at the prospect of partnering with the many people that I meet in the course of meetings like this as well in other venues to make it happen.

Thank you very much.

KEYNOTE ADDRESS
What We Have Learned
Toni Haas, Rapporteur, USA

Greetings to the fewer, the braver, and the heartiest. Thank you for staying for this, the last session, in an exciting, exhilarating, exhausting week. After listening to all the general sessions, as many workshop sessions as I could attend myself, reading the summaries of the workshop sessions written by others, and being part of the buzz, chatter, and debate during breaks, meals, and precious free time, as rapporteur I'm to create a frame for our learnings. I heard three themes: story, power, and climate.

When I see you nodding in agreement, that you heard something like that as well, I'll know I've done my job. I hope we'll have enough time here to discuss where we've made different meaning from what we've heard, I know that's a conversation that will continue until the next time we are together.

The New Story

A New Story is emerging. Emelia Martinez Brawley led us through the positivist to post-modern shift with her presentation on the beauties of post-modern paradigms. With that understanding, we could see the importance of Andrea Wyman's opening presentation, bringing to visibility the lost history of women teachers in the US. Ray Barnhardt helped us to see that alternative stories or world views, can expand our own. Paul Nachtigal and I talked about one new story in the US, a vision of school reform that was rooted in place (place-based education) and based on the notion that rural communities and their schools could only get better together. Tom Tiller, independently, moved us all with his recollections of deeply place-based education that he experienced on his day out of school.

There are at least six elements to the New Story about rural communities and identities in the new global millennium. The first is that they are based on a vision of rural as different, not deficit (Jim Montgomery has done the first analysis of the research that shows either of these positions may guide research on rural issues, the findings will be deeply, but invisibly, influenced by the bias of the author.) The new story is based on rural strengths.

One of those strengths is small scale. In rural places, one knows and is known by others in multiple roles. We see one another as health care providers, as educators, as economic developers, shopkeepers and business owners, but also as neighbors, as parents, as members of social, professional, and faith congregations. The complexity and interdependence of human beings is inescapable, as are the effects of decisions, positions, and opinions. When there are relatively few of us, none of us are redundant. Each of us matters. The way we treat one another is the raw material from which we build community.

"Community" is not an abstract concept. It is the medium in which we live, work, and 'have our being'. Far from a romantic view of a 'peaceable kingdom', we understand community as the ring in which we work out our very real differences, mediate conflicting agendas, and learn to compromise with one another. More about that later.

The new story seeks a balance between local wisdom and outside expertise. We heard Jack Shelton say, on behalf of local communities, "we neither want nor need missionaries or mercenaries". While Jack's insight came from his work in the US, it resonates worldwide. The new story recognizes the need for hard data and information. John Bryden of Scotland brought news of OECD. Bill Reimer's report of the work that he and his colleagues have done on rural economic development in Canada and the forces that influence it reminded us that rural places are affected by decisions made locally and at a distance. Mark Witham's sophisticated statistical analysis and elegant unpacking of actual costs of providing services in rural places in Australia was a beautiful example of the kind of information rural places need to make decisions for themselves and point out (maybe even predict) the unintended consequences of decisions made on a regional, national, or international level. (One of the downsides of small scale is that rural places can be fragile, vulnerable to huge effects from seemingly small decisions.)

The new story embodies a sophisticated understanding of the breadth of issues faced by people striving to live well, particularly those living far from the centers of power (and outside the imaginations of predominantly urban or suburban policy-makers.) Encouragingly, the new story struggles to transcend dichotomies. It looks for friends, not enemies. It acts on the belief that understanding alternative views expands our lives, rather than requiring us to choose. It acknowledges the interdependence across sectors of health, education, and economic development, blending these efforts into true community development and seeks common goals. Jim Montgomery outlined the common issues faced by rural professionals, regardless of their job titles or areas of primary concern. Kathy GermAnn reported on the Red Deer Community Health Center's work to create shared community-wide vision of healthier communities using a broad definition of health, and the reports from Fort St. John of common orientation to working and living there, common professional development, is just one example of how the new story is working on the ground. Jonathan Sher urged us to focus on children's well being as the ultimate goal, regardless of where the children live.

Nicola Lawrence told us of efforts in Queensland to attract and keeping physicians in rural areas. We were struck with the similarities of issues in rural Australia, those in rural Canada described by John Wooten, and those in the US that Gary Hart discussed. We have much to learn from one anothers' successes. Similarly, Alison Monk talked with such great enthusiasm and cheer about the mental health work with farmers and their families in Shropshire, I was struck with how much people in the midst of the last and future farm crisis in the US could benefit from what she has learned. Over the time of the conference, it became clear that we have common gaps in service as well. Gay, lesbian and transgendered rural teens are a group that no one seems to have developed productive ways of helping.

The new story is sensitive to the importance of local context and the complexity of human endeavors. Small places can have negative, as well as positive, attributes, including insularity, provincialism, and closedness to outsiders. Tom Gougeon's work on the stages that outsiders must traverse to become at home in a place is another example of the power of this conference. A Canadian professor, he synthesizes research data and applies it to people entering rural settings in ways that enable others to make practical use of it across the world and across sectors. Brian Cheers and Bob Lonne are addressing similar issues for social workers in South Australia. Recognizing the importance of local context acknowledges that rural places simultaneously share some attributes in common and are profoundly unique. That adds to the complexity of crafting policy that is sensitive to, helpful to rural places, regardless of sector. The task is further complicated by the conflicting images that the very notion of "rural" creates, as Rhys Evans of Scotland demonstrated, analyzing the Countryside March in London.

Finally, the new story embraces accountability but tinkers to solutions rather than specifying outcomes. When I took my first psychology classes thirty years ago, holding two competing ideas in your head at the same time was called cognitive dissonance and was the definition of insanity. Now it is a survival skill.

Issues of power.

The second theme of this conference for me was about the devolution of power. The work we've described to one another is principles based, with a deep moral, spiritual, ethical underpinnings that we are comfortable articulating. Cris Sidoti, Human Rights Commissioner of Australia taught us about the basic issues of human rights and rights of children (and shamed the US delegates, I am from one of two nations that hasn't signed the International Treaty on the Rights of the Child, and it's not Somalia.)

The strong belief that people affected by issues must have a say in addressing them was often expressed. We agreed that sustainability comes from including multiple interests and perspectives. Examples of how that broadens our collective wisdom came from Ron Eglash's work with using African designs to teach fractals and Native American cybernetics, Ray Barnhardt's work assisting schools throughout rural Alaska to integrate Alaska Native knowledge, ways of knowing and world views into all aspects of rural education, the work of Michael Zapf and his colleagues to create Learning Circles for social workers, and role of Elders and Elder teaching described by Louise Underwood, Trish Rosborough and Bruce Cooke-Dallin of Malaspina University College. The discussion that followed Lia Ruttan's workshop on issues in shared schools in mixed Aboriginal and non-Aboriginal school systems disclosed how complex these issues are.

There seemed to be strong agreement that consensus is based on best possible solution at this time, not the purity of a single point of view. As a group, we are committed to doing what is necessary to obtain a good (but not perfect nor external) outcome at this time. The work is messy, untidy and painful. With few exceptions, we are learning to be measured in our language, and civility is the oil that smooths social relationships

What I heard was a fundamental shift from a technical, problem/solution metaphor to an organic metaphor for health. The question for all of us becomes, "Does this action help us become more or less healthy?"

Climate

Although the weather was generally cloudy, rainy and cold, the climate at this conference was warm as could be. There was a high energy here, a sense that rural advocates are riding a rising tide of interest, commitment, positive futures for rural places, rural people, and an emerging group of young leaders. David McSwan of Australia embodied that perspective with his every word and action, as did the cadre of graduate students describing their work. This view was captured for me in a story Jim Montgomery told about a small town north of Vancouver called Hope. "We in rural Canada," he said, "talk about everything outside the urban part of British Columbia as being this side of Hope."

You all exhibited a deeply heart-felt personal and professional responsibility to the rural people of the world. Mark Witham said, in a casual conversation we were having, that "policy is what we do, not what we say" and what we are doing in our work and our lives is driven by a commitment that extends far downward and inward.

I heard great pride in and respect for the place, natural beauty, and significance of the work. The most obvious way this was manifest for me was in the work of Jenny Horn, who created arrangements of cedar, flowers, shells and rocks evoking Nanaimo and the island for the beauty in the large hall and who saw that each of the workshop rooms had locally grown flowers.
Working in the context of beauty can only inspire each of us to make our work more beautiful. Darlene Higgins, Mike Grant, and Jim Montgomery prepared the conference and bent every effort to facilitate our work together, and I speak for all the delegates in thanking them.

Finally, I was struck with our mutual acknowledgment of the preciousness of one another. There were many fine presentations by people I didn't mention by name in this summary, to each of you and to those who participated by their presence, my thanks for the contributions you made to the success of this conference. Rachel Hryniuk told me that the cedar, which was gathered to adorn the hall where we first met, and which is outside and inside this room, will go back to where it came from on Saturday to protect travelers.

So I leave you and this beautiful place with fond thoughts and renewed energy for the tasks we share. In the words of Garrison Keillor be well, do good work, and keep in touch.

TECHNICAL PAPERS

Rural Professionals: A Tertiary Preparation Model

Bernie Krynowsky, Canada

Abstract

Research has identified factors or issues that affected rural professionals' perceptions of living and working in rural communities. The investigation into these perceptions was most often related to a common goal of developing and maintaining excellent professional practices and practitioners within rural communities. The author interpreted the research regarding issues and needs of rural professionals in order to design a tertiary interdisciplinary course to help achieve the goal. The conference presentation revolved around the proposal of a tertiary interdisciplinary course. The major components of the course included: presentations and readings on historical, social, and work contexts of rural communities, case studies on rural professional experiences, a problem solving workshop with students from interdisciplinary areas (e.g. social work, nurses, teachers) exploring and finding solutions to case study rural and multicultural scenarios, interviews with professionals working in rural communities, and mentor guided practical experiences in rural communities with interdisciplinary cohort groups. Feedback on the proposed course was provided during a critical analysis by 18 participants. Some suggestions were incorporated into a revised overview design which will be presented in this paper. Further critical analysis and suggestions from readers are welcomed.

The intention of this paper is to propose an outline for a tertiary course in rural studies for professionals such as teachers, nurses, and social workers. This will entail providing an overview of major needs for rural professionals, outlining specific outcomes for the course, and suggesting possible relevant assignments and learning activities related to the outcomes. This tertiary course could be an elective in general studies or be given credit towards professional certification.

Important Components for a Rural Studies Course

A review of the research suggested that the following areas should be key components for effective rural preparation of professionals:

- knowledge about social and professional aspects of living and working in rural communities
- exposure to work and life in a rural community
- experience working with a mentor in a rural setting

Proposed Course Overview

Course outcomes: Prospective rural professionals will be able to:

- have a better understanding of the issues facing rural professionals by identifying and discussing critically potential positive and negative features of working in a rural community
- become familiar with the social, cultural, and historical contexts of rural communities
- interact with other professionals in the identification of rural issues and be able to analyze case studies in order to create possible solutions to professional challenges
- experience and reflect on life and work in a rural community with the support of other fellow professionals and a mentor

Course structure and learning activities

Course work will consist of eight three hour workshops with a rural placement practical work experience for 2-3 weeks. There will be a readings book of four to seven relevant articles related to the course content. Assignments will consist of: researching and writing a rural issues paper, completing a major project related to their chosen profession, completing a two to three week rural practical experience, and presenting a critical analysis of the experience.

Lesson #1- Orientation Day

Have guests who have worked in rural setting come to the first class. Social interactions and formal and informal presentations by some of the guests. Possibly have a video or interactive video conference of an individual who is currently working in a rural area. They can address the joys and challenges of their personal and professional lives with questions and answers. Stories about rural experiences will be read and discussions held around the issues that have arisen. In the last hour, the instructor can review of the course outline, readings, and assignments.

Another possibility might be to have a 2 day excursion to a rural community to visit various facilities and professionals who live and work there. In preparation for the next lesson students will be asked to come prepared to discuss two critical issues or questions regarding living and working in a rural community.

ASSIGNMENT(20%): students to prepare an issues paper which entails a critical analysis of 3 issues revolving around living or working in a rural community.

Lesson #2- Historical and Social Contexts of Rural Communities

The instructor will present a historical perspective on how and why rural communities have been established. They can provide foundational information on: what an operational definition for rural might be, reasons (historical and social) for rural communities, characteristics of rural communities and isolated families. Have students come up with a list of associations between the foundations and issues previously identified.

Student preparation for next day- readings on the historical and social contexts of rural communities and issues paper presentation.

Lesson #3- Analysis of Issues Affecting Rural Professionals

Have students share their analysis of their issues paper with brief presentations to small groups within the class. Have a whole group review some key issues and implications for rural professionals. Have discussions on key points revealed in the readings on the social, historical contexts of rural communities. Move into a role play situation regarding situations of issues within a rural setting. For example one of the scenarios might revolve around a rumor that has been going around town about a certain professionals unusual behavior. Different roles could be assigned in the plot. The plot is then analyzed from various role positions.

Further instructor presentation on rural communities including societal values, social structures, and community development.

Lesson# 4- Finding out more about rural professionals and their work

Review key concepts regarding rural issues and rural foundations. Link these to the importance of finding out more about their chosen profession in a major assignment.

MAJOR ASSIGNMENT (50%) Students will be asked to complete a research project on their respective professions in terms of: defining some of the job descriptions, describing how to get a position in a rural area, designing a questionnaire for an interview with a colleague/s working in a rural setting to find out more about life and work conditions. Ideally the course would have a rural placement so that the individual could live and work in a rural setting. If not it would be essential for the individual to visit a rural center to complete the project. Class time would be spent in planning and researching this project. Access to internet and library resources will be important for this lesson.

Lesson #5- Case Studies, communication skills, and problem solving-

Presentation of scenarios of situations occurring in rural setting where professionals typically interact. For example how would a teacher, social, worker, nurse work together in a situation where a student/client was experiencing some physical abuse at home. The workshop will consist of 2 or 3 scenarios whereby a mixed group of aspiring professionals (students in the class) would attempt to identify what roles they would play in assisting the individuals. There would be debriefing and analysis in a whole class setting. It would be excellent if rural professionals or professionals in the area were available as debriefers or consultants (e.g. nurse , teacher, or social worker).

Lesson #6- Cultural Perspectives Simulation (BAFA BAFA)

One of the main issues identified in the literature is the rural professional fitting into the culture of the community. This is very important for successful practice in a rural setting. This activity is a powerful simulation in which various cultural perspectives are acted out and analyzed. The students get to experience what it is like to be another culture trying to express a point of view. Synthesis and analysis of this role play will result in a list of considerations for how they can successfully become part of the community. Debriefing will result in a list of key points to consider when working in another cultural setting.

Practical Experiences (2-3 weeks) in Rural Setting

The students, hopefully working with mentors or sponsors, will work as an assistant in their chosen profession. This experience could also possibly be a term end practicum as there are likely other courses taken concurrently.

ASSIGNMENT (20%) - Students will be asked to complete a daily critical analysis journal on their experiences. The journal would have predetermined criteria for excellence. The practical experience would be given a pass/fail rating with a report jointly written by the student, mentor, and possibly the tertiary instructor.

Lesson #7- Major Assignment Presentations

Students will be asked to make a 20 minute presentation (Groups of 3-4) on their major assignment on their chosen profession. The student presenters will be asked to prepare a written analysis of their presentation based on the feedback and discussion generated by peers in their group (15% of mark). The major assignment (described in lesson 4) will also be handed in at this point (35% of mark).

Lesson #8 Debriefing Interview after the practical experience

There would be a one hour debriefing of field experience done in small groups and a half hour sharing of key experiences in the whole group setting. The students will book a one to one interview with an instructor/instructors. This interview would entail representing and discussing their learning experiences. It would be an opportunity for reflective analysis and closure to the course. The quality of the interview analysis would be judged on predetermined questions and criteria for 10% of the course mark.

Celebration- Gathering of students in a social setting to mingle and share their collective experiences. Could have some skits or story telling regarding their experiences. Invite other individuals with experiences in rural communities.

Closing Thoughts

The intention of this paper is to provide a possible model for improved tertiary preparation of rural professionals. To this end, the model needs to be critically analyzed for its worthwhileness and feasibility. Additionally, there needs to be more attention to the details (e.g. what readings, what criteria for assignments etc.). Most importantly there needs to be an initial implementation and trial. These challenges lie ahead.

Online Teaching And Learning With Webct

Mary O'Neill, Canada

Abstract

WebCT is course authoring and delivery software that lets instructors build sophisticated internet -based learning sites. WebCT has been especially developed for non-technical users to design web sites that provide a full array of educational tools and facilitate online learning, collaboration and communication. By using simple templates, educators can then customize their courses using a variety of tools to create simple or very sophisticated learning environments. Especially useful in distance delivery; Malaspina University-College in Nanaimo, British Columbia is currently offering a Master's of Education in Rural Studies as a collaborative graduate program with James Cook University of Northern Queensland, Australia using the WebCT interface for class discussion, assignments, thesis development and faculty/student communication. This session will demonstrate WebCT's application for distance delivery and offer participants' hands-on experience with this versatile authoring tool.

Since 1994, the World Wide Web and related Internet resources (e.g., e-mail, chat, and news groups) have become an increasingly viable component in higher education pedagogy. This has led to significant interest in the implementation of Internet based resources and teaching tools which support dynamic online learning environments.

WebCT is a tool that facilitates the creation of sophisticated World Wide Web-based educational environments by non-technical users. It can be used to create entire on-line courses, or to simply publish materials that supplement existing courses. WebCT not only produces courses for the WWW, but also uses WWW browsers as the interface for the course-building environment. Aside from facilitating the organization of course material on the web, WebCT also provides a wide variety of tools and features that can be added to a course. Examples of tools include a conferencing system, on-line chat, student progress tracking, group project organization, student self-evaluation, grade maintenance and distribution, access control, navigation tools, auto-marked quizzes, electronic mail, automatic index generation, course calendar, student homepages, course content searches and much more. WebCT is an easy-to-use environment for creating sophisticated WWW-based courses that are otherwise beyond the ability of the non-computer programmer. currently it is estimated that over 2 million students are accessing WebCT courses worldwide with more than 1200 licenses (one license can provide access from one course to over 1000).

Technical Support-

WebCT program developers are committed to technical support and the WebCT newsgroup offers timely answers to instructor and course developers' questions regarding all aspects of course design, development and access.
For more information on WebCT please access their website at www.webct.com or contact them via email at support@webct.com

Software Licensing

Note that use of WebCT is free until such time as student accounts are created. This allows installation and initial course design and testing to occur at no cost. Charges only apply once you want your students to use your course. Pricing is per machine (server).

- A license is intended to serve the students of one campus.
- All licenses include single-point e-mail technical support. The unlimited server license also includes single-point telephone support.
- Upgrades to the most current version of WebCT are free for the duration of your license.
- The "Number of Accounts" is the sum of accounts over all courses on the server. Thus if one student is registered in two courses that use WebCT, this counts as two accounts.
- If you offer consecutive courses during the license period, you only need purchase a license according to the maximum number of student accounts on the server at any one time. For example, three 4-month courses of 100 students each offered without overlap on the same server would only require a 100-student 12 month license (as that is the largest number of accounts on that server at any one time during the license period).

Conference Workshop Session-

In this workshop session, participants will initially be given the opportunity to access a WebCT course template using a student login. Workshop participants will use a variety Web CT course tools. Basic features will be discussed including; online chat, bulletin board, email mailbox, assignment posting, web resource links and hyperlinked text documents.

WebCT course designer tools will also be demonstrated from an instructors login. Students will become familiar with setting up a sample page, adding students, accessing the quiz features etc. Advanced features such as online grading and evaluation tools will also be demonstrated and participants will be encouraged to pose questions and discuss user-related issues.

References:
WebCT Course Authoring Software [Online]Available www.webct.com May 14, 1999

Pricing
All pricing is in US dollars

Table 1.

Number of Accounts On Server (the total number of WebCT Student accounts over all courses on your server)	License Charges For That Server			
	4 Month	**6 Month**	**8 Month**	**12 Month**
50	$100	$140	$180	$250
71	$150	$210	$270	$375
100	$200	$280	$360	$500
200	$300	$420	$540	$750
400	$400	$560	$720	$1000
800	$500	$700	$900	$1250
1600	$600	$840	$1080	$1500
3200	$700	$980	$1260	$1750
6400	$800	$1120	$1440	$2000
12800	$900	$1260	$1620	$2250
25600	$1000	$1400	$1800	$2500
51200	$1100	$1540	$1980	$2750
Unlimited Single Server License	$1200	$1680	$2160	$3000
Corporate License (per server)	$1200	$1680	$2160	$3000

CoNNect PROGRAM

Paul Montgomery, Canada

Background

An electronic program was piloted in British Columbia between 1993 and 1998 called New Directions in Distance Learning (NDDL). This program took on many shapes and evolved yearly taking advantage of many new technological advances that seemed to fit the learning program. NDDL was an initiative of the Ministry of Education, the Open Learning Agency and the nine B.C. Distance Education Schools. This program aimed at grade 11 and 12 courses particularly and at small secondary schools which had difficulty in providing an entire high school program due to staff size &/or expertise. Some Distance Education school students were enrolled in NDDL courses but for the most part the enrollees were from regular schools. Some of the NDDL instructors were staff directly from the DE schools and a great deal of experience was gained.

The distance education schools, building on the knowledge gained through NDDL and the technological infrastructure that was being put into place, began piloting projects aimed at students in other grade levels from Kindergarten to grade 10.

North Island Distance Education School (NIDES) developed a project called NIDES On-line which used the technology to enhance student learning at the elementary level. South Island Distance Education School (SIDES) purchased copies of Successmaker and piloted a model of putting computers in students' homes with a learning platform and a computer guided instruction model directed by SIDES teachers. These pilot projects led to a number of other initiatives at other distance education schools in the province where teachers and students were using the technological infrastructure to enhance and support student learning. All of these initiatives have culminated in the creation of CoNNect, the electronically enhanced distance education program for students from Kindergarten to Grade 12.

In the spring of 1998 the Ministry of Education sent out a letter to all superintendents in B.C. regarding " Funding for Home-based Learning Programs – delivered by electronic means". It was announced that districts must obtain approval for distributed learning programs and that the funding level for these would be $3,500 per FTE. In a subsequent letter it was announced that the provincial enrollment for electronically delivered programs was being capped pending a review of the situation. The nine Distance Education Schools were given a total allotment of 1074 FTE students and this was divided up among the 9 schools. For the year 1999/2000 the cap remained while the MOE attempts to develop future policy. There is a concern that the enrollees in the program were formerly Home Schooling students where funding levels were only a few hundred dollars per FTE instead of $3500. Some enrollees were in fact former Home Schooling students however many were formerly attending regular schools where funding levels are in excess of $4,000 per FTE.

In 1998 the Open School decided that the delivery of NDDL should be the responsibility of the B.C. Distance Education Schools. Some transition funding was provided by Open School and as of September 1998 a program called CoNNect was fully operational at all of the DE Schools.

What is CoNNect?

CoNNect is a technology enhanced program of studies at the K – 12 level and is available from each of the nine Distance Education Schools within British Columbia.

The CoNNect program

The distance education schools recognize the tremendous resource they have in the provincally developed distance education materials. Distance education teachers work with Open School staff to ensure that these materials not only meet the provincial curriculum but that they meet the needs of the home-based learner.

The nine distance education schools held a meeting Jan. 21 - 23, 1998 to develop an implementation plan for CoNNect. At that meeting, there was unanimous agreement among the distance education school staff that a technology enhanced program should have the following goals.

Goals:

Curriculum based: The foundation of a technology enhanced distance education program will continue to be the curriculum materials which are based on the provincial IRPs. Technology will improve the delivery of the curriculum, but will not replace it.

Interactive: Technology will enhance the interaction between teachers and students, and it will create opportunities for interaction where none currently exist, particularly between students themselves, and among parents.

Accessible: Students and teachers will be able to use appropriate technology to support instruction and will have access to exemplary resources to support learning through technology.

Flexible: The program will allow teachers and students to use different strategies and resources to achieve the same outcome. The design will be flexible enough to allow for modification for students in different regions and for learners with special needs.

Motivating: The stimulation created by increased interaction and access to exciting learning resources will motivate students and parents to participate more fully in the education al program.

Responsive: Communication technologies will ensure that students receive feedback more quickly on their work, especially assignments and exams. It will also offer new opportunities for feedback.

These goals for CoNNect are congruent with the goals of education set out by the Ministry of Education. The distance education materials have always been designed to meet the intellectual development of the student but have been weak in meeting the shared goals of human and social development and career development. In the past these goal areas were left mainly to the parents. The electronic environment will greatly enhance the distance education student's ability to develop in the areas of human and social, and career goals through their educational experience. It is the interactivity that the technology brings that allow students to enter into debates and discussions, to broaden their world view and explore a wider range of educational goals and experiences that is the strength of CoNNect. On-line career fairs and work experience have been piloted very successfully, as has an on-line mock trial for the Law 12 students. We are only beginning to explore the possibilities for students working in the electronic classroom.

What is the Ministry of Education's Requirement?

Mandated B.C. Curriculum: The Ministry of Education and now the Open School ensure that all distance education materials available for use at the distance education schools meet the curriculum as stated in the current IRPs. Any resource development that the distance education schools will be involved in will also adhere to provincial IRPs. The distance education program is articulated directly to the provincial curriculum so that students can easily be placed in the program at any point in their learning and find the subsequent move back into the traditional school setting easy.

Reporting: CoNNect students will receive almost daily feedback via e-mail from their teachers. In addition, either the teacher or principal will usually visit the home of elementary families at least once each year. Some DE schools will visit the secondary students in their homes or the students and/or their parents will arrange appointments at the DE school to speak to counsellors or administrators. Each returned package of student work will have comments from teachers or markers with guidance for the home learner. All distance education students receive at least three formal report cards each year. The elementary students have teacher written report cards whereas secondary students receive computer generated reports. Secondary students, their parents and other significant people can request a report at any time of the year. The distance education schools hold the permanent record of all full grade students. If a student is registered in a public or independent school and is taking part of their program with a distance education school then the DE school informs the home school of the student's progress so that the information may be added to school report cards and the permanent record.

Accountability: The distance education schools have program accountability through the materials developed through the Ministry of Education and the Open School. In addition, the distance education school funding model currently in place is based directly on student performance. This model ensures financial accountability.

The distance education schools operate using an administrative computer system that is industry standard and very powerful. Both regular reports and ad hoc reports are able to be generated. By designing the data entry appropriately the DE school will be able to track the CoNNect students through the program. In addition, school staff will be able to provide anecdotal information. This year some polling of participants has given the DE staff information for adjusting the program.

A plan will be put in place for the monitoring of the financial and educational impact of CoNNect for the 1998/99 school year.

Parent Commitment: All distance education students must have the support of their parent(s) in the form of a signed application form in order to register. In addition, parents of CoNNect students must sign acceptable use forms and rental agreement forms in order to participate in the on-line portion of the program. Parents and students also participate in training events which further outline their commitment and expectations.

What Courses are available via CoNNect?

Open School's 14 on line OSCAR courses are available (bold below) as well as many others:

CAPP 11, CAPP 12
Law 12
Lit 2
Chemistry 11
Math 8 TLE
Media Arts 11
EN 08, EN 09, EN 11, EN 12
PE 08, PE 09, PE 10

Sc 08, Sc 09, Sc 10
Entrepreneurship 12
Film and TV 11
First Nations 12
SS 08, SS 09, SC 10, SS 11
History of Film 12
Info Tech 8
Info Tech 09, InfoTech 10
InfoTech 11
Math 10 TLE
Info Tech 12
Math 09 TLE
Writing 12
Journalism 12

Cost

- Full grade student enrolled only with the DE School - Free
- Student enrolled in another school-$375
- Adult who has not graduated $125
- Adult who has graduated $375

(all fees include the $30 OSCAR charge)

Enrollment

1998/99

- 647 secondary students
- 1104 elementary students
- 2454 total users including home instructors (often parents)

1999/2000

- Approximately 3,000 total users

Secondary CoNNect Delivery

The secondary program makes use of subject expertise via Provincial Marker/Instructors. Through experience we learned that having one expert for a subject area provincially worked much better than all nine DE Schools having their own marker/instructors. Students submit their work electronically and they receive electronic feedback within 24 to 48 hours rather than the two weeks that students on a regular paper based course experience. The provincial staff are available to students via email and when necessary even by phone. They are encouraged to be proactive with students and when problems arise they alert a local representative at each of the DE Schools that follow up or intervention is required.

Elementary CoNNect

The model for elementary CoNNect is quite different from the secondary program. Full time teachers on staff are involved in the program and they have regular contact with their students. Most of their students' programs consist of our regular paper base however many activities are added which are conducive to an on line environment. A number of novel studies have been developed by Distance Education staff with numerous web links to enhance the various activities. In addition teachers often direct students to various course modifications or substitutions. Interactions between student and teacher, student and student and even parent and teacher are very much encouraged. An online conference area has been established which cannot be accessed by students where parents can communicate with one another about things that work for them or ask one another questions.

Who are the Clients?

The bulk of the students enrolled in CoNNect courses at the present time are full time students enrolled only at the Distance Education Schools. Provincially, the number totals 1074 and this has been capped for the school years 1998/99 and 1999/2000. Students attending regular schools may also enroll in CoNNect courses and the school is charged $375 per student. Although this fee doesn't totally cover all of our costs the price was established to encourage schools and their students to participate in the program. Adults haven't been widely enrolled in CoNNect as training has been an issue but we expect that this will not remain a problem for long as there are options of providing cd rom, online and VHS training resources among others.

What is the Model?

The current technical model for CoNNect relies very heavily on Computer Conferencing by way of a program called First Class. This is a bulletin board with a great many features that together create a solid learning environment. The program is internet accessible (web based) and it is password protected (to provide privacy and protection for our student population). Students are able to have live chats or dialogue through individual and private mail boxes. Assignments can be posted and can easily and quickly be uploaded and/or downloaded.

We are also using Clarisworks 5.0 or Appleworks as our students are using Macintosh and pc computers. This program provides a cross platform basis that enables programs to be opened by either computer platform regardless of which one the item was created in. Eudora, Netscape, Explorer & All The Right Type are also provided to all students.
Electronic Environment:

The CoNNect program does not simply deliver the curriculum using electronic means but creates a complete electronic environment in which teachers, parents and students work and communicate.

All students on CoNNect will have access to the following:

- on-line tutoring for distance education courses
- teacher-moderated chat
- e-mail
- subject specific conferences
- grade specific conferences
- parent conferences
- peer tutoring
- virtual fieldtrip and/or guest speakers
- sharing of published student work
- bulletin board resources such as FAQ's, notices of events, electronic errata sheets, announcements
- internet references to curriculum related sites, resource sites, skill development sources, on-line tutorials
- electronic submission of assignments
- on-line technical support
- access to a library of supplementary resource for enhancement and remediation

What are the Technical Requirements?

- Students require the following minimum standard:
- Pentium 2 with 200 MHz, 32 Meg RAM, 1 Gig HD, Windows 95 or later, 28.8 modem or faster and CD-ROM drive.
- Macintosh must be a Power PC or newer + specifications listed for the pc.

What is the Staffing Arrangement?

For the 1999/2000 school year the staff model consists of theExecutive Director, the Provincial Coordinator, a Technician, the Project Assistant, Provincial Instructor/Markers, DES Site Facilitators, and DES Elementary Teachers.

Executive Director The roles and responsibilities for the Executive Director in the CoNNect Program are varied and complex. Some expectations are:

- Reports to the Distance Education School Principals
- Responsible for all Provincial Program areas regarding staff (DESS, Elementary and Secondary CoNNect) and budget
- Chair Standing Committee on Personnel
- Attends all committee meetings (Curriculum, Technology)
- Liaise with Open School, Ministry and all 9 Distance Education School Districts
- Responsible for the budget

Provincial Coordinator The roles and responsibilities for the Provincial Coordinator in the CoNNect Program are varied and complex. Some expectations are:

- support on-line teachers and markers
- facilitate communication among DE site facilitators and coordinate projects of common interest
- manage on-line resource development contracts including copyright
- manage the provincial elementary resource site
- plan and organize in-service training programs
- oversee secondary discussion groups
- provide leadership in the development and implementation of pilot projects
- coordinate local pilot project information sharing
- coordinate the on-line resources and references
- represent the CoNNect program at conferences, workshops or displays and meet with interested outside parties

Technician The roles and responsibilities for the System Administrator in the CoNNect Program are varied and complex. Some expectations are:

- Maintain the CoNNect Program's conference, Web and mail servers
- Provide technical support to CoNNect Site Facilitators, Provincial Markers as required
- Develop and maintain all appropriate system documentation
- Develop and modify permissions schema for system users
- Negotiate and manage service contracts for all CoNNect hardware
- Work with program managers to identify new hardware and software solutions
- Maintain and update software licenses for CoNNect as required
- Maintain a help line for CoNNect participants
- Develop training materials and user documentation for students and educators
- Develop and maintain Web-based resource sites for CoNNect participants
- Develop FAQ pages, design forms, and develop other pages as needed
- Publish student work
- Help educators/students create "virtual field trips" for the CoNNect Web site
- Develop Web-based promotional materials about the program

Project Assistant The roles and responsibilities for the Project Assistant in the CoNNect Program are varied and complex. Some expectations are: P

Provide clerical support for CoNNect Committees and Management teams when and as required

- Handling purchasing, ordering and distribution responsibilities for all equipment and materials needed
- Scheduling and logistical coordination for staff training events

- Performing a wide range of administrative support functions, including checking and responding to E-mail from CoNNect users
- Providing development support for training and promotional materials
- Assisting in the development of public presentations
- Publishing documents on the CoNNect Web site
- Tracking Web-based forms and updating Web pages

Provincial Instructor/Markers The roles and responsibilities for the Provincial Marker in the CoNNect Program are varied and complex. Some expectations are:

- Complete your Resume and produce a Welcome Letter
- Check First Class E-mail daily and respond within 24 hours
- Respond to telephone calls immediately
- Create and monitor at least one Discussion Group per course
- Respond to students/parents questions within 24 hours
- Use course conference area for 1)assignments 2)course tips 3)welcome message 4)FAQ's
- Make your own home page
- Mark and return papers within 72 hours
- E-mail mark and comments directly to student
- Complete on-line forms or tally sheet weekly
- Establish and broadcast office hours – one 2 hour session per week (or more)
- Markers to be provided with a $20.00 per month long distance telephone account – TBA
- Students must E-mail marker to arrange for a telephone conference
- Must post when and for how long you will be away, whether on holiday, sick, etc. and have these notices set for automatic open

DES Site Facilitators The roles and responsibilities for the Executive Director in the CoNNect Program are varied and complex. Some expectations are:

- Provide leadership/program advisement /counseling to CoNNect students and parents
- Local training of students and staff
- Work with System Administrator to select and design conferencing tools and formats
- Provide leadership in the implementation of new tools and methodologies
- Coordinate content creation for central repository, post notices
- Design local promotional materials
- Recruit and monitor CoNNect students

The Community Resilience Manual

Don McNair, Canada

A new resource will link rural revitalization to CED best practice
by the Community Resilience Project Team

Abstract

The Community Resilience Project endeavours to equip distressed rural communities with a process they can use to link local action to current best practice in community-based economic development. The "resilient community" is one that takes intentional action to enhance the personal and collective capacity of its citizens and institutions to respond to and influence the course of social and economic change. By assessing their current level of resilience in terms of proven indicators, and then cross-referencing specific weaknesses with successful revitalization methods, communities can design more effective, sustained strategies of renewal. The results of the project to date are contained in the Community Resilience Manual, currently available in draft form for discussion purposes. The Manual walks communities through a 3-step process:

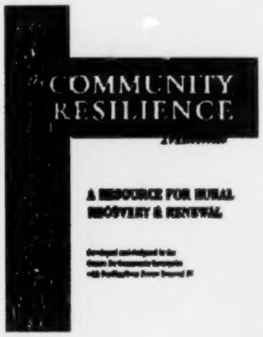
Data collection to complete a Portrait of Community Resilience expressed in terms of 23 characteristics and four dimensions of resilience.

Portrait analysis to identify priority issues.
Formulation of a strategy to address priorities through reference to a catalogue of best practice resources and methods.
In the five field tests to date, participating communities have reported that the process described by the Manual gathered new information about local attitudes and organizations, and provided a framework for local decision-making and priority setting. Participating communities were also impressed with how the process engaged a broad cross-section of the community in thinking about resilience and its economic impact, and in this way created new energy for local initiatives.
The origins of the Community Resilience Project lie in the dilemmas of residents of British Columbia's small, resource-dependent towns, that is, places that owe their existence to harvesting, extracting, and processing natural resources like trees, fish, minerals, and farmlands. Battered by dramatic changes in markets, technology, environmental law, and the resource base itself, hundreds of these communities have found themselves presented with a stark choice: change or die. Some have died - abandoned by their people, especially the young. Many limp along on a hope and a prayer. A few, however, have bounced back.

Dissecting this diversity of experience in such a way as to help rural communities avoid errors and replicate successes is what the Project is all about. Funded by the Communities Committee of Forest Renewal BC, a provincial crown corporation, a team from the Centre for Community Enterprise set to work in the fall of 1998. Our task has been to develop a conceptual framework and process through which resource-dependent communities can work to strengthen local resilience. After assessing and analyzing their current level of resilience, they cross-reference its weaknesses with proven strategies and instruments of rural revitalization. Communities then use this information to achieve more durable and cost-effective results from the time, talent, and resources they invest in local planning and development. As a result of greater resilience, they are better able to control their future in the face of change.

The task has taken us far and wide in the past 14 months. The existing literature concerning definitions and indicators of community health, quality of life, and resilience is immense, not to mention that describing practical strategies for rural recovery. Still more daunting has been our desire to interpret, clarify, and organize that information so as to create something practicable for small, often isolated communities.

The results of our labours to date are compiled in the *Community Resilience Manual*, now available in a draft form in portable document format (PDF) from this website. Suitable for storage in a 3-ring binder, the Manual is divided into three sections:



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A guide to a 3-step approach for strengthening community resilience.

A series of data collection tools and formats that residents can use to develop a Portrait of Community Resilience and set priorities for local action.

A catalogue of best practices selected on the basis of their power to address six functions which CED experience indicates are essential to community economic well-being. We have tested the model and data collection tools in five B.C. communities so far, and more will follow. Residents of the test communities have indicated that the "lens" of resilience evokes new insights and awareness of the link between the local economic, social, and political situation. As a result, new energy has been mobilized for CED and community action.

That being said, we also recognize that we have more to learn in order to ensure the Manual is as flexible, straightforward, cost-effective and meaningful as possible in a variety of rural communities. The following article summarizes its conceptual framework and process as an invitation to you to collaborate in the evolution of the Project, and its improvement and extension to other communities.

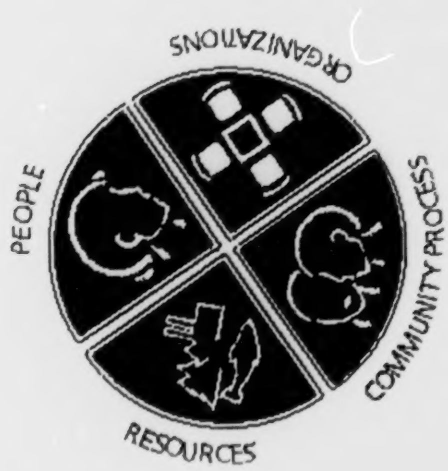
What Is So Important About Community Resilience?

A resilient community is one that takes intentional action to enhance the personal and collective capacity of its citizens and institutions to respond to and influence the course of social and economic change.

As communities face increasing levels of social and economic volatility, they are having to adapt. The ability to assess and specify their level of resilience allows communities to identify areas of weakness, and select and implement strategies that have been proven to target those difficulties.

A New Understanding Of Resilience

In order to assist communities in strengthening the level of their resilience, we have developed a new conceptual model. It starts with four dimensions:



- *People:* Residents' beliefs, attitudes, and behaviour in matters of leadership, initiative, education, pride, co-operation, self-reliance, and participation.
- *Organizations:* The scope, nature, and level of collaboration within local organizations, institutions, and groups.
- *Resources:* The extent to which the community builds on local resources to achieve its goals, while drawing on external resources strategically.
- *Community Process:* The nature and extent of community economic development · *People:* Residents' beliefs, attitudes, and behaviour in matters of leadership, initiative, education, pride, co-operation, self-reliance, and participation.
- *Organizations:* The scope, nature, and level of collaboration within local organizations, institutions, and groups.
- *Resources:* The extent to which the community builds on local resources to achieve its goals, while drawing on external resources strategically.
- *Community Process:* The nature and extent of community economic development planning, participation and action.

The dimensions are the main themes or core components of a community's social and economic structure. They form a foundation for a detailed analysis of community functions and for the creation of a Portrait of Community Resilience.

Adding Detail To The Model - 23 Characteristics

Each of the four dimensions is described in more detail by a series of characteristics of resilience. These characteristics are more specific than the dimensions. They are the factors that we can examine in a community to assess the level of resilience present. We can research and analyze them.

The characteristics in the model of resilience are not exhaustive. However, they have been chosen because they have proven to be strongly predictive in assessing resilience.

23 Characteristics Of Resilient Communities

People

Leadership is representative of the community.

- Elected community leadership is visionary, shares power, and builds consensus.
- Community members are involved in significant community decisions.
- The community feels a sense of pride.
- People feel optimistic about the future of the community.
- There is a spirit of mutual assistance and co-operation in the community.
- People feel a sense of attachment to their community.
- The community is self-reliant and looks to itself and its own resources to address major issues.
- There is a strong belief in and support for education at all levels.

Organizations

There is a variety of community economic development (CED) organizations in the community such that the key CED functions are well-served.

- Organizations in the community have developed partnerships and collaborative working relationships.
- Resources
- Employment in the community is diversified beyond a single large employer.
- Major employers in the community are locally owned.
- The community has a strategy for increasing independent local ownership.
- There is openness to alternative ways of earning a living and economic activity.
- The community looks outside itself to seek and secure resources (skills, expertise and finance) that will address identified areas of weakness.
- The community is aware of its competitive position in the broader economy.

Community Process

The community has a community economic development plan that guides its development.

- Citizens are involved in the creation and implementation of the community vision and goals.
- There is on-going action towards achieving the goals in the CED Plan.
- There is regular evaluation of progress towards the community's strategic goals.
- Organizations use the CED plan to guide their actions.
- The community adopts a development approach that encompasses all segments of the population.

Using The Model Of Resilience

The Community Resilience Manual uses the concept and model of resilience to help communities through a structured and focused process of prioritizing and planning. This is a 3-step process.

Step 1: Draft A Portrait Of Community Resilience

Data collected for each of the 23 characteristics is documented and analyzed in a Portrait of Community Resilience. Resilience is not static. It changes in relation to internal and external stresses. So the Portrait is important as a way to identify current resilience strengths and weaknesses, and then to track change over time.

Collection of data is streamlined by using indicators that specify exactly what information is needed. Indicators associated with each of the characteristics are included in the Manual. They have been selected because they have proven highly predictive of the characteristics and because they represent information that is relatively easy to access.

The model uses both quantitative indicators (such as population data from a recent census) and qualitative indicators (such as surveying people's perceptions) to identify the extent to which each characteristic is present in a given community. Section Two in the Manual presents a variety of tools and options for collecting this data.

Step 2: Use The Portrait To Establish Community Priorities

The Portrait provides a new perspective on the social and economic structure of a community. Analyzing it can help communities to gain new insights into factors that can increase their capacity to adapt and influence the course of change.

The Manual describes a decision-making process which helps communities to further analyze the significance of the Portrait to their community resilience. The decision-making process suggests ways of involving community members, applying their insights and knowledge and prioritizing resilience weaknesses. The result in all test communities has been one priority that, once addressed, will significantly increase the community's ability to take intentional action to strengthen its resilience.

Step 3: Select Appropriate Strategies & Tools

Once community priorities have been established, it is time to decide what actions a community can take to best improve its resilience. The Community Resilience Manual includes a detailed catalogue of a wide range of promising strategies and tools.

The Catalogue has been created by gathering information about community economic development "best practice" from across North America. Described in detail are strategies and tools, who applied them effectively and how, together with contact information and additional recommended resources.

All address one or more of the six functions essential to community economic well-being:

Access to Equity Capital
The extent to which reinvestment of capital is influenced or controlled by a community affects its ability to influence economic development. Its absence, or the flow of capital from a community, is a major factor in the decline of a community economy. In resource-dependent communities, this can also be influenced by securing greater control over the local resource base.

Access to Credit

Without access to credit, enterprise development is impossible. In communities under stress, traditionally risk-averse, conventional sources of credit tend to dry up. Creating sources of credit that are locally owned and controlled, or are influenced by the community is critical to long-term community survival.

Building Human Resource Capacity

Capacity for intentional action depends on vision, participation, and the skills of local people. It is critical to the creation of new initiatives, whether they concern social, economic, or entrepreneurial development.

Capacity for Research, Planning, & Advocacy

Active, on-going research ensures that planning is informed and that local interests can be represented to decision-makers within or outside the community.

Creating Partnerships Within & Outside the Community

Strategic, targeted networking and partnership development focuses on strengthening relationships to solve problems, to create new opportunities, and to mobilize community and outside resources to address local priorities.

Infrastructure

While streets, sewers and buildings are typically in the domain of the City Planner and the City Engineer, it is important to link infrastructure planning to the community's vision and goals.

The Catalogue entries (34 in the current draft; closer to 60 in the coming first edition) represent the actions which communities have taken to address these functions. The chapter entitled "Designing Financial Strategies," for instance, includes explanations and examples bearing on access to equity and/or credit:

- community development loan funds
- community equity investment funds
- community foundations
- community revolving loan funds
- comprehensive development finance institutions
- equity match-making
- individual development accounts
- loan guarantee programs

The chapter "Creating Jobs" features strategies which undertake a number of critical functions by means of entrepreneur support services, self-employment strategies, and venture formation, including:

- business incubators
- entrepreneur network facilitation
- feasibility studies support
- community-owned venture development
- co-operative employment partnership
- joint ventures
- nonprofit enterprise development
- outside entrepreneurial recruitment
- worker-ownership
- business visitation/mentoring
- early warning systems
- succession planning and worker buy-out

To the maximum extent possible, the examples are taken from Canadian small town experience.

Cconclusion

The Community Resilience Manual will not replace, but rather enhance whatever planning process a small town is currently using. Communities involved in the field testing identified a number of benefits to their local economic development planning process. They reported that the process described by the Manual gathered new information about local attitudes and organizations, and provided a framework for local decision-making and priority setting. Participating communities were also impressed with how the process engaged a broad cross-section of the community in thinking about resilience and its economic impact, and in this way created new energy for local initiatives.

This collection of resources is neither a quick fix nor a mere research methodology. Instead, it opens up a way of thinking and helps focus community dialogue on key aspects of healthy community functioning that seldom find their way into a community strategic plan. The resources provide communities with a means to systematically strengthen their capacity to steer towards the future which they choose.

Your comments or questions about the material will be appreciated as we proceed to complete the field testing and editing. The release of the Manual's first edition is scheduled for Autumn 2000.

If your community is interested in exploring options for assessing your local resilience or for participating in the field testing, contact the Community Resilience Project by e-mail, or mail to Centre for Community Enterprise, ATTN: Community Resilience Project, PO Box 1161, Port Alberni, B.C. V9Y 7M1. The COMMUNITY RESILIENCE PROJECT TEAM comprises six Centre for Community Enterprise staff, associates, and affiliates: Michelle Colussi, Mike Lewis, Sandy Lockhart, Stewart Perry, Pippa Rowcliffe, and Don McNair.

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Conference Closing Address

Mike Grant, Canada

When you live on an island like this, one of the parts of your life is that you travel on ferries. If you happened to travel on the ferry, you would have noticed that as the ferry came towards the dock, there was a ding dong and then an announcement. So it's my honor and to give the ding dong and to give the announcement. The voyage is nearly over, at least for Nanaimo. But we have one thing we need to do before we stop. For those of you who were here on Monday, you'll understand this. For those of you who weren't, I'll explain in a second.

What we've done here is we've got together and we've talked. Jim set one rule for us. He did it a little more politely than this. But in the rural context, the rule is you can butt in whenever you feel like it. I think we've been successful in carrying that rule right through. People broke it occasionally, but Jim reminded us to do it. Hopefully we're going to do something over the next few years and we're going to continue to butt in on each other's conversations. I guess the reason why I was able to support this is two-fold.

About 5 years ago, I received a phone call from a colleague to where one of our graduates had gone in teaching. The colleague said to me, Mike, your graduate is wonderful, but I have some advice for you. Your graduate's having some real difficulty, and I said Well, how is that? They said, Come on Mike you've worked in rural schools, the person really didn't know what they were getting into, and while they're wonderful, they're struggling. So, why don't you get your act together and do something to help people become better rural school teachers.

I knew that Jim taught a course in Rural Education, so I went into the hall where we do our really serious work. I said, Jim what do we do? How are we going to accomplish this? Jim sort of shrugged his shoulders and said, Well I guess we could teach the course. So, we sat there and chatted and then we started to talk to each other about our own experiences. After about 5 or 10 minutes of talking to each other, we looked at each other and said, You know I've never told anybody that story. That incident made me realize, that while I had worked in a rural context and had raised my children in a rural context, I didn't have a language to talk about it. Here I was thinking I was a fairly intelligent, thoughtful person. But because I didn't have a language to talk about it, I didn't have a chance, I didn't have the power to talk to others and learn from their experience. So, Jim hooked me. Now, something else has happened in between then and now. As some of you saw, I have two wonderful grandsons. They're living in a rural community. I want those boys to have the vocabulary and the language to be able to talk about their place when they grow up. I want them to be able to learn from the experiences they've had in a meaningful way. For that to happen, while the elders amongst us who have done so much work, their contributions will help - we need to have novices come in. I've had the honor of working with groups of people over the last 3 years in partnership with James Cook, who I believe are wonderful novices to look at this area.

Now, they work hard and they read the work of the elders, but what happened this week, magically is they've seen the elders and I think they understand now that they can stand on the shoulders of those elders and move forward.

If we've accomplished that this week and if we've accomplished the skill and practice of butting in to each other so we can learn from each other, even as our Billy Girard ferry or our voyage expands beyond space over the next several years, then this has been a wonderful success.

I'd like to thank you for having the faith and the belief that getting together and seeing each other, and becoming a community for a week is worthwhile. I'd like to thank, on your behalf, the people who you have thanked many times over in my office who have done something very special. They've provided the supported service. For me, being the Dean, has been a very easy job, as you can see. Believe it or not, I actually get paid for doing this. All I have to do is go out into the hall and as I walk past Darlene's desk, say, what do I need to do? and when I walk past Jim's office say where do I go now? Thank you Jim, thank you staff and thank you all for coming. Have a very safe voyage home, and we hope to meet again in 3 years.

Thanks.

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Featured Keynote Speakers

Dr. David McSwan is the Director of the Rural Education Research and Development Centre at James Cook University, Queensland, Australia. He began his teaching career as a rural primary school teacher in the pastoral region of New South Wales before moving to North Queensland.. He has higher degrees in education and regional economics. His research and development interests include rural education, economics, demography, and social and community issues. He was instrumental in running a national conference on research needs of rural education in 1990 and was the convenor of the international conference in 1994 on Issues Affecting Rural Communities which attracted contributors and attendance from eight different countries. Current interests include the development of an international network of scholars to support higher degree research in rural studies.

Dr. Andrea Wyman is an associate professor at California University of Pennsylvania. Her work in researching the lives and work of rural women teachers resulted in the writing in 1997 of *Rural Women Teachers in the United States: A Sourcebook*. She was the 1998 recipient of the Distinguished Research Award in Rural Education by the National Rural Education Association. Andrea is continuing her work in documenting the experience of rural teachers through a project with the Center for Rural Pennsylvania and the Heinz Endowment. The collaborative project among elementary education majors, fourth-grade public school children and local senior citizens involves training students to take oral histories from individuals who taught or attended one-two-or three room school in southwestern Pennsylvania.

Rural women teachers arrived at the helm of America's education movement through unusual circumstances; wars, economic and agricultural depressions and westward expansions. Their ability to lead was tested time and again, yet they rose to the occasion by developing coping strategies that strengthened not only their common drive to provide a solid education for America's youth but bound them together as an educational cadre. The voices of the women provide the best means of discerning how they developed coping skills, established networking across geographically unique circumstances, served as mentors to each other and worked to establish themselves in an educational arena of salary and administrative inequity. Their voices also describe the joys, pleasures and dissatisfaction they felt about their professional positions and their personal lives. Moving past the simple historical timeline of rural women teachers is a different view of the women, a visual presentation of the teaching experiences faced by the women and their overall appearance as one, two and three-room schoolteachers working and living in rural communities. Relying on one of the most unique systems of one-room school teaching still prevalent today, interviews with Amish women teachers will be presented to describe their work and their ability to develop networks not all that dissimilar with traditional one-room schools of 150 years ago.

Mr. Mark Witham, is the Assistant Director of Resource Allocation in the South Australian Department of Education, Training, and Employment. His position involves translating educational policies into funding formulae for preschools, R-12 schools, and Institutes of Technical and Further Education. He is currently completing a PhD in Rural Education at James Cook University. Mark has research interests in the economics of school closure and resource allocation.

Mark's presentation will examine the costs of rural schooling in South Australia, from the internal allocations of resources in four country and four metropolitan case-study schools. It is clear that the basis for allocating resources at the system level is not congruent with how schools themselves allocate resources. The particular policy implication of this mis-match for rural schools relates to the allocation of resources to senior secondary students. The system assumes that senior secondary students require significantly more resources than schools actually allocate. Schools re-allocate these surplus resources back to junior secondary students in both country and metropolitan areas. Country schools tend to have relatively lower retention to year 12 and thus have less surplus resources to re-allocate compared to metropolitan schools.

Dr. Toni Haas is a Past National Co-Director of the Annenberg Rural Challenge, and believes in social reform through education. She is the former Deputy Director of the Mid-Continent Regional Educational Laboratory, Director of the National Information Center for Handicapped Children and Youth, and Assistant Director of the Program for Dissemination and the Improvement of Practice at the US Department of Education. She taught in Minnesota and Wisconsin in both regular and special education classrooms and at the Universities of Wisconsin-Oshkosh and Madison. Her PhD is from the University of Wisconsin at Madison in regular and special education administration. She is a consultant with many foundations, including Ford, Blandin, Lyndhurst, and the Lilly Endowment and is a field editor for

Research in Rural Education and the ERIC/CRESS Clearinghouse. She writes and speaks on community and education. Her most recent work is *Place Value* (with Paul Nachtigal). *To Establish the Bonds of Common Purpose and Mutual Enjoyment*, which reports on rural school and community development, was written with Robin Lambert and published in the *Kappan* (October, 1995). She's written more than twenty other articles and book chapters.

Mr. Paul Nachtigal is also a Past National Co-Director of the Annenberg Rural Challenge. Prior to assuming this position he was director of the Rural Institute, Mid-continent Regional Educational Laboratory. He spent two years with the Education Commission of the States where he directed a national study of efforts to improve rural education, a study which was published under the title *Rural Education: In Search of a Better Way*. Other professional responsibilities have included nine years with the Ford Foundation monitoring and evaluating school improvement programs, seven years as a rural school superintendent and four years with the Colorado State Department of Education. Consulting assignments have included work for the Lilly Endowment, the Public Education Fund, the Blanden Foundation, the International Paper Company, the National Governors' Association and the National Conference of State Legislators.

Paul and Toni will be speaking on rural schools as resources for community development. As they describe it, public schools have long been recognized as being critical to the ongoing viability of rural communities in the United States. When schools close, the demise of the community often follows. Less well understood is the fact that with the adoption of the urban/industrial model of education, schools have been one of the largest economic drains on rural communities. Supported in large part with local tax dollars, what schools have done best is to prepare students to leave those communities, the majority of which never return. Both economic and, more importantly, the human resources needed to maintain healthy communities are lost. The Annenberg Rural Challenge has promoted an approach to education which is "place-based," connected with the culture and ecology of the local context. An increasing portion of students time is spent studying local issues - economic, historic, environmental, aesthetic, and civic. The results of their work contribute to a community's knowledge base which results in better informed decision making. The students, as they better understand and become contributing young citizens to the life of the community, discover possibilities for remaining or returning to rural places. This presentation will lay out the theoretical and philosophical underpinnings of this approach to schooling along with stories of exemplary programs from the 38 projects currently underway across the country.

Dr. Gary Hart is Director of the Center for Health Workforce Studies and Rural Health Research Center and is a Professor in the Department of Family Medicine at the University of Washington in Seattle. Dr. Hart earned his doctorate at the University of Washington in Medical Geography and completed the Department of Health Services' Doctoral Opportunities Program in 1985 and joined the faculty of the Department of Family Medicine. Dr. Hart has published widely on such issues as health workforce, rural health care, clinical practice variation, and perinatal care at the national, regional, state, and local scales. His numerous presentations have included professional meetings, the Capitol Area Roundtable, and Medicare Payment Advisory Commission (MedPAC). He is the most recent past chair of the Journal of Rural Health and he received the National Rural Health Association's Distinguished Researcher award in 1995 and the Washington Rural Health Association's Friend of Rural Health Award in 1998. He is a co-editor and an author of a major new McGraw-Hill book entitled Rural Medicine that will be available in August 2000.

Mr. Chris Sidoti is the Human Rights Commissioner of Australia's Human Rights and Equal Opportunity Commission. He has worked full time in human rights organisations, both non-governmental and official, for over twenty years. He was appointed to his present position in August 1995. He has also held voluntary offices in a large number of human rights and social welfare councils. He has a particular commitment to the rights of children and young people. Since the beginning of 1998 he has undertaken extensive work on human rights issues in rural and remote parts of Australia, including a national inquiry into education in these areas.

At the beginning of 1995 the Australian Human Rights and Equal opportunity Commission decided to commence a major national program called Bush Talks. As Human Rights Commissioner, Chris travelled to all states and territories to hear what people had to say about their human rights experiences and situations. As a result of that consultation process the Commission in 1999 commenced a national inquiry into rural and remote education. The inquiry covers the education of all children but it has a particular focus on the education of indigenous children and children with a disability. Chris will speak about the results of the consultations and of the education inquiry and will describe other initiatives taken by the Australian Commission to promote the human rights of Australians outside the major metropolitan centres.

Dr. Emilia E. Martinez-Brawley is a Distinguished Community Service Scholar and Professor of Social Work at Arizona State University. Currently she is an Executive on Loan from the university to the City of Phoenix. She has been Dean of the School of Social Work at ASU, Professor at Penn State, and a visiting scholar and researcher at universities in England, Scotland, Australia, Israel, Canada and Spain. She has been involved extensively in research on rural areas, both nationally and internationally. She is the author of several books, among them, *Rural Social and Community Work in the U.S. and Great B*ritain (Praeger, 1982) and *Perspectives on the Small Community: Hum*anistic *Views for Practitioners* (NASW Press, 1990 and 2000). Her current research focuses on addressing the needs of practitioners, remote, and heterogeneous populations. She has also addressed issues of higher education and pluralism and is interested in multidisciplinary work and partnerships between schools and social services. Her articles have appeared in such journals as *Social Work, Social Casework, Human Services in the Rural Environment, The British Journal of Social Work, the Australian Journal of Social Work, and International Social Work.*

Dr. Bill Reimer is a Professor of Sociology at Concordia University in Montreal. He has conducted research on rural Canada for over 20 years, including topics such as the social impacts of mechanization in agriculture, farm labour, poverty, inclusion and exclusion, and most recently, social cohesion. He is currently Past President of the Canadian Rural Revitalization Foundation and Research Manager for the New Rural Economy Project. He has recently presented materials relating to leading and lagging regions of rural Canada, the social and economic history of rural Canada, and the implications of World Trade Organization negotiations for rural Canada.

Dr. John Bryden is the Co-director of The Arkleton Centre for Rural Development Research and the Chair of Human Geography at the University of Aberdeen. He has been Programme Director of The Arkleton Trust since 1980. He is a Member of the Academic Senate 1995-. Other current appointments include External assessor to the Inter-Departmental Committee on Rural Affairs and the Land Reform Policy Group, Scottish Office 1997-; Co-ordinator, Future Prospects Group, European Rural Observatory, 1995- ; Member, Policy Advisory Council, Foundation for the Development of Polish Agriculture, 1998- ; Member, Advisory Board of Leirsinn (Gaelic Research Centre, Sabhal Mor Ostaig, Skye) 1997- . John has co-ordinated four transnational EU research projects on social and economic aspects of rural change and development. He is currently working on two main research projects, one on differential economic performance between peripheral rural areas; the other on the impacts of the information society.

His contributions as an author include *Tourism and Development* (Cambridge University Press, 1973*); Agrarian Change in the Scottish Highlands* (With G Houston: Martin Robertson, 1976*); Towards Sustainable Rural Communities* (University of Guelph, 1994*); Rural Employment: An International Perspective* (with R Bollman (Eds.) CAB International, 1997); *Rethinking Rural Human Resource Management: The Impact of Globalisation and Rural Restructuring on Rural Education and Training in Western Europe.* (Mansholt Institute, Wageningen, Netherlands. 1997 with Bor W van den, and Fuller A M). John has been a farmer in the Scottish Highlands, and initiated a rural computer conferencing and e-mail system (RURTEL) for rural organizations in the mid-1980's.

Professor Tom Tiller, from a small rural island in Northern Norway, is a Professor of Education at the University of Tromsoe, Norway. He has published several books on rural schooling, school and local communities, school development, lifelong-learning, action research and action learning, teacher education and qualitative methodology. (most of them in Nordic languages). Professor Tiller has been a visiting professor at the University of Sports, Oslo, University of Umeå, Sweden and is now a visiting professor at Luleå Technical Univerity, Sweden. For a period of 8 years he was the Head of the Faculty of Teacher Education at the University of Tromsø.

Dr. Jonathan P. Sher is the President of Rural Education and Development, Inc., through which he does speaking and consulting at the national and international levels. His full-time work is as the President of the North Carolina Child Advocacy Institute (www.ncchild.org). A well-known author in the fields of rural education, entrepreneurship and community development, Jonathan has championed small schools and the central role of schools in rural communities for decades. He founded REAL Enterprises -- a student entrepreneurship initiative that is being successfully implemented in more than a dozen states across the US, as well as serving in a variety of university posts over the years. Earlier in his career, he was head of rural programmes at the Centre for Education Research and Innovation of the Organisation for Economic Cooperation and Development (OECD) in Paris -- as well as on the staff of such Washington, DC-based organizations as the Center for Community Change, National Rural Center and National Conference of State Legislatures.

Jonathan received his doctorate in Administration, Planning and Social Policy from Harvard University's Graduate School of Education.

Jonathan's conference address is entitled "Connecting Rural School Reform and Rural Child Advocacy." It will discuss the two-way relationship between educational improvement and child well-being, especially in the context of diverse rural communities. Jonathan will make the point that academic achievement alone is far too limited a goal for schools and he will offer some challenging ideas about how to make rural schools and communities even better places to be a child and to educate a child.

Dr. Jack Shelton is the Director of the Program for Rural Services and Research at the University of Alabama (Alabama, USA)which he organized in 1979. PRSR efforts focus upon health, education, and community development and have been supported by national and regional foundations and federal, state, and local government agencies. PRSR work is undertaken primarily through three program components: Student Coalition for Community Health (SCCH); PACERS Small Schools Cooperative; and AlabamaREAL. SCCH efforts have led to the establishment of numerous primary health care clinics, libraries, parks, and other rural community services; have gathered significant rural health data; and provides rural learning opportunities for medical and pre-medical students. PACERS is a nationally and internationally recognized approach to and program for rural school and community enhancement. AlabamaREAL is a statewide program providing schools and communities entrepreneurial education and opportunity. Jack holds a Ph.D. from Glasgow University (Scotland). He is the recipient of the Lyndhurst Prize. He has served as a consultant to foundations and universities in the US. Jack is a Research Fellow at James Cook University, Queensland, Australia. He and his wife Martha have three sons and five grandchildren. They live on his great grandparents farm in Westover, Alabama.

Jack's presentation "Better Rural Schools Building Better Rural Communities" will delineate approaches and outcomes of the PACERS Small Schools Cooperative, a decade-long effort in rural Alabama, USA, to unite schools and communities through school-based initiatives that have simultaneously enhanced student learning and improved the quality of local life. The presentation will focus upon the creation, nature, and outcomes of educational opportunities and approaches that are consequential for rural students and their communities, that build upon local strengths, and that aim for rural sustainability. It will include an overview of program artifacts and outcomes (products, curriculum, program formats, and assessments); will briefly review the program's local, state, and national partnerships; and will consider the implications of the program for rural education enhancement and developing community sustainability.

Dr. John Wootton is the Executive Director of the Office of Rural Health, which was established in Health Canada in September of 1998. John is a practicing family physician in Shawville, Quebec, and has been in rural practice for 20 years. He has practiced in other small communities in British Columbia, northwestern Ontario and Quebec. John is a graduate of McGill University in Medicine, and has served as Chairman of the Rural Practice Committee for the College of Family Physicians of Canada and as Scientific Editor for the *Canadian Journal of Rural Medicine*. He is a member of the Society of Rural Physicians of Canada, the College of Family Physicians of Canada, the Canadian Medical Association, the Quebec Medical Association and the Federation des Médecins Omnipracticiens du Québec, among others. He presently lives in Shawville, Quebec, with his family.

John will be talking about "Rural Health Reform: Canadian Opportunities". There are revived discussions about primary health care reform at many levels of government, and many projects are on the go in many places. At the same time concerns about access to services in rural areas have never been higher. John proposes to link these two topics, in the Canadian context, and present this linkage as an opportunity for reform to broaden its base and embrace what needs to be done for rural communities. He will describe how this perspective informs the work of the Office of Rural Health and how partnerships are critical in building a consensus that will work.

Contributions

These papers, too large to be reprinted in these proceedings, but too valuable to exclude, have been archived in www.mala.bc.ca/ruralconf/

Deidre Young abstract

The Western Australian School Effectiveness Study has collected quantitative, longitudinal data from 21 schools (rural and urban) over the last three years with the result that some schools were identified as being particularly high achieving and low achieving in science and mathematics. On analysis of the statistical date, some schools were found to increase achievement of students more than others, irrespective of their ability or performance. Four rural schools and one urban schools were studied intensively using a case study approach. Stress, teacher morale and achievement were all factors which were found to impact upon effective schooling.

This paper will discuss some of the statistical and case study findings which identified schools in trouble.

Wolfgang Fisher & Robert Lawson Abstract

Only very limited research is currently available on the social, economic, legal and educational impact of consumer affairs in remote and rural areas. This research monograph of Professor Wolfgang Chr. Fischer & Professor Robert Lawson (Editors) may be considered as unique to the extent that literature, empirical studies and contributions to improve further Consumer Affairs in Remote and Rural Areas are concerned.

Some features of this research monograph include:

- The traditional concept of consumer affairs in OECD countries is based on the standard and circumstances of living in capital cities or at least in medium-sized cities. Rural areas sometime have a short distance to the services in cities. Whereas people living in small towns and vast remote areas, like in Australia, and to a lower extent in New Zealand, are virtually neglected in their role and interests as consumers.
- This presentation deals with the economic, social, and legal implications of Consumer Affairs with special consideration of remote and rural areas, and in particular in the large and remote areas of North Queensland (Australia) and Rural New Zealand. As North Queensland and Rural New Zealand face specific social, economic, geographic, and climatic conditions, they provide an example of very difficult areas for the imposition and enforcement of Consumer Affairs.
- In addition, a further important aim of this presentation is to examine the impacts of *Microeconomic Reform (Economic Rationalism)* on Consumer Affairs. This economic policy tries to improve efficiency regardless of the problems that may arise for certain groups of consumers.
- For the most part, this study addresses the question of whether the eight rights of consumers (*World Consumer Rights*), which had been endorsed by the United Nations in 1985, in remote and rural areas are served through the current provision of consumer affairs services and legislation. The research contains three major parts:
- First, an analysis of provisions of consumer affairs in the OECD countries of Australia and New Zealand will be examined with regard to sufficient services in matters of consumer affairs for remote and rural areas.
- Second, principles of development of remote areas and rural communities are presented. Furthermore there is a discussion about the concept of rural well-being, that is the well-being of the individual as the corner stone to the vitality of the community. It is still a matter of recognising and acknowledging the values and desires of each individual, specifically in order to become informed about the values and desires of the community. This has to be regarded as the heart of rural community development.
- Third, empirical studies about the standard of living of consumers in remote areas were undertaken by 93 personal interviews in selected townships in North and Western Queensland, concerning closure of post offices, schools, banks, railway stations, lack of social life and communication centres, and by 795 posted questionnaires all over rural New Zealand.
- There may be policy implications for consumer affairs, for both the alterations of existing policies and future policy development. These could include changes in legislation, restructuring of services, increased funding or an increase in the number of service locations. There may be an increase in the number of consumer education programs in rural areas. These would heighten consumer awareness of consumer protection legislation, consumer advice and representation organisations. Finally consumers may demand more equality in the buyer-seller relationship when they are made aware of what options are available to them.

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[i] Perhaps the single, full-time, career job is becoming an aberration in historical terms. Certainly there are fewer and fewer households where there is just one breadwinner or one source of income.

[iiii] The settlement of rural Canada took place in waves from east to west. The lumber and fishing economies of Atlantic Canada were established in the 17th and 18th centuries, the agricultural base of lower and upper Canada largely in the late 18th and 19th centuries, agriculture in the West in the late 19th and early 20th centuries.

Historically, rural livelihoods have differed according to the region and natural resource base, but essentially livelihoods have undergone the same sequence of transitions. In Ontario (Upper Canada), the household livelihood (a household consisting on average of 10 people) would require a wide variety of skills and include a myriad of tasks, from logging to spinning, from making harness to maintaining roads.

In short, the difference between the historical rural household and the contemporary rural household is simply that for the historical household the home-based business is a farm. The variety of other activities is likely to be similar. Even though the main source of income in the first phase is primary agriculture, the multiple structure of activities in both periods can be described as *pluriactivity*. The major difference today is that livelihoods have a far greater "reach," i.e., they extend over a larger geographical space.

The evolution of rural livelihoods in the Ontario context changes from pluriactivity on and around the farm = **local livelihoods** – to pluriactivity across a wider space and involving several communities, places of work, and social interactions = **arena livelihoods**.

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